

# CLARK COUNTY, WASHINGTON



## REQUEST FOR PROPOSALS

**# 404**

**COUNTY ASSESSMENT, TAXATION MANAGEMENT &  
LOCAL IMPROVEMENT DISTRICT SOFTWARE**

ISSUING AGENCY:

Clark County Office of Purchasing

ISSUED ON BEHALF OF:

Clark County Offices of the Assessor, Treasurer and Information Services

**RELEASED: March 18, 2005**

**CLOSES: April 22, 2005**

**PROPOSALS MUST BE SUBMITTED NO LATER THAN 4:30 P.M. TO:**

**Clark County  
Office of Purchasing**

**P.O. Box 5000  
1300 Franklin Street, 6<sup>th</sup> Floor, Suite 650  
Vancouver, Washington 98660  
(360) 397-2323**

**For alternative formats:**



**Clark County ADA Office; V (360) 397-2025;  
TTY (360) 397-2445; ADA@Clark.wa.gov**

March 17, 2005

Subject: RFP #404 – County Assessment, Taxation Management & Local Improvement District Software

To Whom It May Concern:

Clark County, Washington, is pleased to publish the attached Request for Proposal. Over the past year, County team members have invested significant effort developing the contents and specifications in this RFP. As a result, our RFP document is thorough and lengthy. It is intended to provide a fair representation of our expectations associated with a new property assessment and taxation application suite. We strongly encourage qualifying vendors to submit proposals for the following reasons:

1. The project is funded and has solid executive support.
2. The project team has already done extensive analysis of current applications and business processes.
3. All involved departments have firmly committed to support the project. Our County project team members are extremely knowledgeable, organized and willing to contribute. We believe we have the foundation for an exemplary project.
4. The level of detail in this RFP does not indicate rigid expectations about system design—only that we have made our best effort to document perceived needs.
5. This RFP does not consider any one vendor's proposed business process solution over another. We are very open-minded about any solution that meets our core business needs.

Section 1.2 of the RFP contains the minimum qualification criteria. As long as your solution and those of your partners (if a joint response) meets these criteria, the County will give serious consideration to your proposal. The County prefers a complete “off-the-shelf” software application solution. However, the County will consider and evaluate proposals for a complete re-write of the application suite based upon the requirements and specifications within the RFP. The vendor must demonstrate the necessary business expertise and propose an acceptable design for this consideration. In the event of a “re-write” project, the first qualification requirement in section 1.2 will be reviewed on a case-by-case basis.

As you review the requirements of the RFP, the focus of our project will become evident—the daily operations of the Assessor and Treasurer are more than interconnected—they are integrated. This RFP looks for an assessment and taxation system that builds on that foundation.

No single vendor or software system will meet all the County's needs. In fact, we expect and encourage partnerships in developing and submitting proposals. However, all proposals must address the most critical needs of both the Assessor and Treasurer—the more integrated the solution, the better.

Section 1.2 of the RFP is provided to alert you to the subject areas within the RFP that are of highest importance. A key to the success of this project will be measured by thoroughness of the vendor(s) and the County to satisfy these critical elements:

- Excellent service and support
- Open source code for County development and enhancement
- Application flexibility and expandability
- Complete Web functionality
- Seamless ESRI GIS integration
- Complete process workflow capabilities

Additionally, the specific needs of the Assessor and Treasurer offices, which are detailed within the RFP, will be weighed heavily in the determination of the final selection.

Please pay particular attention to the supplemental questions found in Appendix N. Responses to the questions in Appendix N are not required in your proposal at this stage. Vendors selected as finalists, however, will be required to provide answers to many of these questions in writing and through scripted product demonstrations. Vendor responses will be used to further refine the selection process and confirm our understanding of the functional responses from the proposal. The supplemental questions in Appendix N should not be considered all-inclusive of the depth or breadth of questions that finalists will be called upon to answer.

We recognize and appreciate the significant time and effort that will be required to respond to this proposal. Please keep your proposal concise and focused.

Sincerely,

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Linda Franklin  
Clark County Assessor

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Doug Lasher  
Clark County Treasurer

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*Note: All Appendices are available for viewing via FTP link. To obtain access rights, contact Linnea La Rocque via phone or e-mail: (360) 397-2323 [linnea.larocque@clark.wa.gov](mailto:linnea.larocque@clark.wa.gov).*

## 1. INTRODUCTION, BACKGROUND AND GENERAL INFORMATION

### 1.1. PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit proposed solutions for software and services for the offices of Assessment/GIS and Treasurer of Clark County, Washington.

The County is seeking a software solution encompassing:

- Application and database software
- Implementation/integration services
- Project management services
- Data conversion services
- Training (both technical and end-user)
- Complete documentation (both technical and end-user)
- Software and hardware configuration and testing
- Follow-up maintenance and support.

The legacy applications currently supporting the Assessor's and Treasurer's offices are tightly integrated. GIS applications are also tightly coupled with the legacy applications. Extensive efforts have been made to integrate processes as well as systems between the two departments. Staff members of the Assessor's and Treasurer's offices are co-located on one floor. Process and policy integration meetings occur frequently between the departments. Proposers shall consider interdepartmental integration and communication to be an essential feature for any application.

The core legacy applications for the Treasurer's and Assessor's offices both run on an operating system that will no longer be supported after December 31, 2006. Implementation is expected to occur in advance of that date.

The County understands that some proposers may not offer full functionality as listed in this document. Proposers are encouraged to propose any or all of the functional areas. Additionally, the County encourages "partnering" by Proposers to present the strongest possible solution, provided the prime and sub-contractors are appropriately identified. All costs associated with activity to be performed by a subcontractor shall be included in the proposer's cost estimates. Whichever form the partnership takes, please keep in mind that the County's prime objective is to have an integrated, centralized solution.

The County prefers a complete "off-the-shelf" software application solution. However, the County will consider and evaluate proposals for a complete re-write of the application suite based upon the requirements and specifications within the RFP. The vendor must demonstrate the necessary business expertise and propose an acceptable design to qualify for consideration.

Based on the responses to this RFP, Clark County will select finalists, ask for demonstrations/presentations from the finalists, visit sites where the finalists have installed solutions and further evaluate the finalists.

## 1.2. QUALIFICATION CRITERIA

To expedite the RFP process for all parties, minimum qualification criteria have been established. The proposer must meet the following criteria to be considered.

- Supply a minimum of three (3) references. We define an “off-the-shelf” application as one that has utilized the proposed software for at least one (1) full year or complete assessment and tax cycle in a production environment.
- Maintain support services for all software proposed in response to this RFP for at least five (5) years. Additionally, maintain and support the software for at least four (4) years after declaring product end-of-life.
- Correct program errors (bugs) found in the software system at no cost to the licensee for a period of one (1) year from the date of final implementation.
- At a fixed hourly rate, modify software as necessary to meet any current or new state mandated or legislative requirements (e.g. recent changes in criteria for the Senior Exemption Program, the proposed addition of a property tax exemption program for widows of veterans, and the addition of a new park district and its associated levies, tax rates, budget, etc.). These changes need to be tested and implemented before state-mandated changes take effect unless otherwise agreed to by both parties.
- Provide a copy of the software source code to be held in escrow with Clark County or with a third party. Clark County shall have full rights to all software source code in the event Proposer quits doing business or the business is sold. If the software source code is held in escrow by a third party, Proposer agrees to notify Clark County in writing no less than sixty (60) calendar days prior to the cancellation of the escrow. If the escrow is cancelled, the software source code shall be automatically turned over to Clark County by the third party. This includes all programs, libraries, and utilities required to build and maintain the software program. Proposer will keep the software source code current with each new release of the product(s).
- Allow the user access to program code, including the ability to develop program enhancements in-house.
- Convert historic, digital data records; including integration of and access to that data in the new system.
- Include thorough training and support.

The application must meet the following criteria to be considered:

- Accommodate the Microsoft Windows desktop environment and operate on the County's hardware and software platform (see section 1.9 – County Infrastructure).
- Have integrated system components, not just interconnected modules or programs, e.g., no duplication of data elements or their maintenance, processes are automated from beginning to end through both offices.
- Handle significant, if not unlimited, growth in the number of parcels and accounts.

- Provide seamless interaction with ESRI GIS software.
- Have strong Web-based capabilities.
- Have flexible report writing tools.
- Allow the user to process appraisal updates by individual properties or in batch mode both using table driven computer models.
- Provide a flexible CAMA application that will allow the user to apply percent and table adjustments to update assessed values, based on various selection criteria. Models for all property types (residential, commercial, industrial, multi-family) must be available for annual adjustment of values.
- Allow the user to perform computer-assisted mass appraisal (as detailed in the requirements), meet statutory requirements for processing and reporting information and support internal and external auditing.
- Provide for workflow management.
- Be able to distribute property taxes based upon levy rates.
- Have an open-interface environment for integration to other systems, such as the Point-of-Sale receipting system, and the Oracle Financials Application.
- Be able to create and maintain property tax records in accordance with Washington State RCWs.
- Have a fully functional Assessment Management module (e.g. Clean Water, CRID, Drainage, Lighting, Water Utility, DNR-Fire Patrol).
- Comply with GAAP and state-prescribed BARS accounting.
- Have a fully-functional customer service module.

### **1.3. PROJECT DESCRIPTION AND OBJECTIVES**

Over the past year, Clark County has conducted an extensive project to document and analyze the systems and processes currently utilized by the Departments of Assessment & GIS and Treasury. In the course of this project:

- 99 detailed process flowcharts were developed.
- Legacy software applications were identified and documented.
- Visions for the new applications and processes were discussed and documented.
- Gaps and major problems in the legacy software and processes were identified and documented.

This RFP is the product of the research to date. It is assumed that the other deliverables from this project will be made available to the successful vendor(s) to assist with successful project management and implementation of the new integrated applications.

#### 1.4. CLARK COUNTY, OVERVIEW

Clark County is located in southwest Washington, immediately north of Portland, Oregon. The County covers 627 square miles, from the Columbia River on the south and west, to the Lewis River and the foothills of the Cascade Mountains on the north and east.

Seven incorporated cities are located in Clark County: Battle Ground, Camas, La Center, Ridgefield, Vancouver, Washougal, and Yacolt. Vancouver is the County seat and the most populated city, with an estimated 152,900 residents.

Clark County, with a population of 383,300, is one of six counties that make up the Portland-Vancouver, Oregon-Washington Metropolitan Statistical Area (SMA). The SMA has a population in excess of 1.9 million residents. Clark County's population ranks fifth largest among Washington's 39 Counties.

Population	2000	2003	2004	Change	% Chng
Clark County	345,238	372,300	383,300	11,000	3.0
Incorporated	178,959	192,475	198,650	6,175	3.2
Unincorporated	166,279	179,825	184,650	4,825	2.7
Battle Ground	9,322	12,560	14,220	1,660	13.2
Camas	12,534	14,200	15,360	1,160	8.2
La Center	1,654	1,855	1,990	135	7.3
Ridgefield	2,147	2,185	2,195	10	0.5
Vancouver	143,560	150,700	152,900	2,200	1.5
Washougal	8,595	9,775	10,770	995	10.2
Yacolt	1,055	1,115	1,135	20	1.8



Source: Washington State, Office of Financial Management, July 2004

The County's population growth has been rapid. Between 1980 and 1990, the County's population grew 24%. Over the next decade, 1990 to 2000, the County's population grew 45%.

Extensive additional County demographic details are available on these websites:

<http://gis.clark.wa.gov/applications/gishome/publications/index.cfm?fuseaction=quickfacts>

<http://gis.clark.wa.gov/applications/gishome/publications/index.cfm?fuseaction=showpopecon>

#### 1.5. JOINT LOBBY, OVERVIEW

The three offices of the Assessor, Treasurer and Auditor are located in one area within a single building. They share a joint lobby, the purpose of which is to provide centralized, coordinated services to the public. By means of the joint lobby, as well as integrated back-office working space, the three offices have made substantial progress in their mission to improve customer service, integrate systems, and improve internal workflows.

## 1.6. OFFICE OF ASSESSMENT & GIS, OVERVIEW

The Department of Assessment & GIS annually sets the value of all real and personal property within the County. These values are used to compute property tax rates for the County, its cities, school, library, fire, and other special districts.

The department is also home to the County's Geographic Information System (GIS), which supports the appraisal process with computer-based maps and analysis. GIS products and services are available to the public through the department's storefront.

### Clark County Assessor

In accordance with RCW 36.16, the Assessor is elected by public vote to a four-year term. Duties and responsibilities of the Assessor are contained largely in state laws and administrative codes. The Assessor works closely with the Washington Department of Revenue to implement these laws and codes.

The Clark County Assessor manages the Department of Assessment & GIS. The department performs many functions, including appraisals, tax relief, demographics, land records, and levy calculation and certification. Other department products and services include specialized mapping and geographic analysis. The County values approximately 150,000 accounts each year. (Additional information about property taxes in Washington is available on the County's web site.)

The GIS database and the Assessor's database are key components of the County's knowledge base. The two databases are interrelated and interdependent. The CAMA database will include attributes that are populated and maintained by the GIS. The GIS parcel layer and building foot print layer will contain primary keys that relate to the CAMA database. One goal for Clark County is to develop seamless integration between its GIS and CAMA systems. Seamless integration between the GIS and CAMA systems should occur in two areas—database maintenance and inter-application communication.

Major service areas within the department include:

**Office of Assessor** – The Assessor manages the department to fulfill its mission by achieving established goals and objectives.

**Appraisals** – The appraisal process establishes assessed values for property tax purposes. Appraisals cover both Real and Personal property.

**Tax Relief** – Tax relief programs relieve or reduce property tax obligations in six areas: 30% Homeowner's Exemption, Destroyed Property, Senior Citizen & Disabled Person's Exemption, Deferral of Taxes, Historic Preservation, Forest Land and Current Use Program.

**Demographics** – The department provides information on population, housing, employment, income, and other statistics.

**Land Records** – The real property database is maintained through review and certification of boundary changes.

**Levy Calculation and Certification** – The department calculates tax rates for multiple, overlapping jurisdictions, and verifies compliance with statutory and constitutional requirements and limitations.

**Products & Services** – Real and personal property information is available through computer-generated maps and analysis available at the storefront, Maps-on-Line, and Self-Service.

**Geographic Information System (GIS)** – The department’s GIS program is managed as a Countywide and communitywide resource. It provides a broad range of computer-assisted mapping and analysis services to government agencies and the public.

### **Strategic Plan**

The Department of Assessment & GIS identified four primary organizational goals in its strategic plan (2001). Each goal expresses a general outcome, and is supported by more specific objectives and strategies. These goals, objectives, and strategies compose the core of the strategic plan.

Each goal supports the department’s mission statement:

*To identify and equitably appraise property in conformance with state law using accepted mass appraisal principles and to create and maintain accurate maps used to provide geographic analysis.*

*To efficiently provide the public and our co-workers with high quality products and services, created in a supportive, healthy work environment, encouraging cooperation, honesty, integrity and respect.*

The department’s four primary goals, and the objectives and strategies they encompass, are of equal priority. They are all based on the principle that serving the customer is paramount.

- |         |   |
|---------|---|
| Goal #1 | Maintain quality customer service                   |
| Goal #2 | Improve efficiency and maximize available resources |
| Goal #3 | Improve public awareness                            |
| Goal #4 | Remain flexible to changes in laws and regulations  |

The department will review and update the strategic plan over the next two years. Additional information about the strategic plan and the Department of Assessment & GIS can be found at <http://www.clark.wa.gov/assessor> and [www.clark.wa.gov/assessor/gis](http://www.clark.wa.gov/assessor/gis).

## Washington Tax Structure

Washington State and its counties, cities, and junior taxing districts rely on a broad range of revenue sources to provide services to the public. The state's largest revenue source for the state's general fund is sales tax. For local government, property tax is the single largest source of revenue. Both the Assessor and the Treasurer play critical roles in both state and local government tax collection.

For additional information about taxes, see Appendix F, entitled "Overview of Washington's Tax Structure," prepared by the Senate Ways and Means Committee (October 1, 2004).

### 1.7. CLARK COUNTY TREASURER, OVERVIEW

The Clark County Treasurer's office is managed by an elected Treasurer with a four-year term, whose office is responsible for tax and revenue collection, banking, cash management, investments, financial reporting, and debt management for Clark County and its junior taxing districts. The Treasurer's office is divided into two departments, Tax Services and Finance.

**Tax Service** – The Tax Service Department of the Treasurer's Office provides customer service in the following areas:

- Collection and receipting of all property and excise taxes, assessment and general receipt deposits.
- Refunding of overpayments.
- Providing information on taxes, assessments and fees on property owner accounts.
- Collections.
- Excise tax transaction associated with the transfer of property.

The Tax Service Department is divided into three sections: Customer Service, Data Management and Collections.

1) The customer service section acts as a liaison between the County Treasurer and the taxpayer, other County departments and junior taxing districts. The customer service section is committed to ensuring that mutual respect is demonstrated to all the aforementioned groups, through providing quality customer service by:

- Accurate and timely receipting of all tax, assessment and general receipt deposits.
- Accurate and timely posting of all tax, assessment and general receipts.
- Accurate and timely refunding of all tax and assessment overpayments to the appropriate parties.
- Accurate and timely dissemination of tax and assessment information on property owner accounts.
- Friendly, courteous and clear communication with all customers.

2) The data management section is committed to ensuring the integrity of each database maintained within the County which affects data utilized and reported by the Treasurer.

- Effective development and management of all database resources that support the operation of the Treasurer's office.
- Coordination of all database requirements with affected County Departments and junior taxing districts to assure database integrity.
- Accurate and timely dissemination and management of all receivables
- Assure tax and assessment statements are presented in an easily readable and accurate fashion.

3) The Collections section collects delinquent real property, personal property, and gambling taxes for the County. Also, collected are various assessments and fees billed by the County and junior taxing districts. Additionally, returned items (NSF checks) for many County departments are collected within this program. Collections presently contracts with a private collection agency to which certain delinquencies may be referred for additional collection.

**Finance** – The Finance Department is divided into three teams that strive toward financial excellence in serving the County and its junior taxing districts. This department is a critical financial center of the County when it comes to cash management for Clark County and its districts. It works to maximize revenues, provide appropriate liquidity for governmental operations, provide timely and accurate information, and safeguard the accuracy of public transactions and the cash and cash equivalent assets of Clark County. These teams consist of Cash Management, Investment and Debt, and Financial Statement, and Research/Development. These teams are comprised of highly talented people that are dedicated to excelling in customer service and providing quality products.

**Cash Management Team** handles thousands of financial transactions daily for over 400 funds, with daily dollar amounts topping over \$50 million dollars.

**Investment and Debt Team** controls over \$1.2 billion dollars in debt and assets for over 400 funds.

**Financial Statement, Research and Development Team** provides monthly financial data for over 400 funds to assist fund managers in their management decisions, while they continue to improve reporting efficiency and meeting the ever growing reporting demands of the County and its districts.

This is all done in concert of meeting the GAAP, RCW, and WAC standards and regulations.

### **1.8. DEPARTMENT OF INFORMATION SERVICES, OVERVIEW**

Clark County Government is divided into 24 departments and operates with an annual budget of around 300 million dollars. Clark County's 1,696 employees, have their 1,500 PCs linked together on an Ethernet network, utilizing IP protocol (TCP/IP).

The County Information Services Department acts as an internal service bureau, supporting most of the 24 County departments. Two IS technical support specialists and one database administrator (DBA) are assigned to provide full-time support for the Assessment & GIS and Treasurer's Office mainframe software applications. Information Services also provides management coordination and tracking services for bug fixes and enhancements.

The Departments of Assessment & GIS and Treasury are co-located in the newly-constructed central Public Services Center (PSC), which is across the street from the Clark Regional Technology Center (CRTC). The PSC building is configured with the most current technologies available in the County.

Additional infrastructure support is provided by four employees of the Assessment, GIS and Treasurer teams. They provide support for the miscellaneous small databases and ad hoc reporting tools described in the "Current Software Overview" appendix. A central goal of this project is to reduce the number of small databases and redirect those employees to other tasks.

The programmers on the GIS team also provide support and, in some cases, have developed applications for the Assessment teams. Another goal of this project is to reduce the support responsibilities of the GIS team and allow them to focus on GIS tasks.

## **1.9. COUNTY INFRASTRUCTURE**

### **1.9.1. General Standards**

All desktop users at Clark County operate without administrative rights. Software installations and upgrades are managed through Information Services by means of Microsoft SMS. Network security is administered through Microsoft Active Directory by means of Organizational Units. Exceptions, such as laptop "Roamers" are classified as normal "users," as opposed to power users.

Internet Explorer configuration changes are enforced using domain policies.

### **1.9.2. Security standards and policies**

The use of Java scripting or ActiveX controls need to be reviewed and approved by Information Services prior to implementation.

No application may in any way jeopardize network security.

### **1.9.3. Server Hardware/Operating Systems**

Clark County uses 19" rack mountable file and print servers, utilizing Windows 2000/2003 Server as the base operating system software.

In addition, Clark County often utilizes the Microsoft suite of products (e.g., Office, etc.), although other products are employed as needed. The existing enterprise-level databases generally run on Oracle 10, although some run on SQL Server 2000.

Clark County also uses 19" rack mounted HP UNIX servers, running HP-UX 11.11. The existing enterprise-level databases run on Oracle or PI-Open (a PICK-type database).

#### 1.9.4. Server Preferences

- ✓ All servers located at the Network Operations Center are connected to the core network by Ethernet.
- ✓ All data collection (e.g., log files, etc.) should be saved to the server itself. This generally requires the 'software package' to be self-contained.

#### 1.9.5. Desktop/Workstation Environment Standards

##### Application software – user or administration

- ✓ Generally run as standard users with no elevated privileges.
- ✓ Private IP addressing utilizing dynamically assigned IP addresses.

##### Desktop application Software

- ✓ Windows XP, Office XP Professional, Outlook 2002, etc.

##### Desktop hardware

- ✓ PC Clone units utilizing Intel chips ranging from 733 MHZ to 3 GHz.
- ✓ Average memory is 512 MB, and is dependent on the users' needs, and use of device. Hard disk-drive size is also dependent on the users' needs and use of the device.

#### 1.9.6. Network Infrastructure—General

In downtown Vancouver, the County has a fiber backbone with current speed at one Gigabit per second (Gbs) to most buildings. Most buildings have wiring to drops that will support 100 Megabits per second (Mbs) to the desktop and most of these drops are connected at 100 Mbs. The remote sites are linked through a combination of fiber at 1 Gbs, T1 (1.54 Mbs), or ISDN connections (128 Kbs).

- ✓ The County network uses a public address range that is owned by the County. The addresses are statically assigned. The City uses a portion of this range at their sites where DHCP is used.
- ✓ Servers only have static IP addresses.
- ✓ All Networking equipment have a static IP address.
- ✓ All sites are routed.

#### 1.9.7. Core Network

- ✓ Workstations are Ethernet based.
- ✓ IP is the only accepted protocol.
- ✓ Every site/floor is a subnet with every device in the core being connected to a switch.
- ✓ IP routing is used to get between the subnets.

**1.10. CLARK COUNTY SOFTWARE APPLICATIONS**

Overviews of current Clark County applications are included in the appendices to this RFP.

**1.11. AUTHORIZED RECEIPT OF RFP**

All proposers shall be listed on the Plan Holders List to be considered responsive. To be listed you may contact Clark County Purchasing:

Linnea LaRocque

[linnea.larocque@clark.wa.gov](mailto:linnea.larocque@clark.wa.gov)(360) 397-2323 (8:00 a.m. to 5:00 p.m. Pacific Time)

**1.12. RESPONSES TO QUESTIONS**

All inquiries will be made to:

E-mail: [linnea.larocque@clark.wa.gov](mailto:linnea.larocque@clark.wa.gov)

Phone: (360) 397-2323

(8:00 a.m. to 5:00 p.m. Pacific Time)

There will be a pre-bid conference beginning at at 1:00 p.m. (Pacific Time) on April 6th at the following location: 1300 Franklin Street, 6th floor (Training Room) Suite 679.

Proposers may participate by phone or in person. The purpose of the pre-proposal conference will be to answer questions pertaining to the RFP.

Proposer questions and resulting answers will be made available for viewing by means of the Clark County web site: [www.clark.wa.gov](http://www.clark.wa.gov) located in "Bid Information." We encourage proposers to submit questions via e-mail in advance of the conference call to allow the county team time to research and qualify our answers.

Proposer questions will not be answered after the date identified in the project schedule in section 4.2.

Note: All Appendices are available for viewing via FTP link.

To obtain access rights:

Contact Linnea La Rocque via phone or e-mail. (360) 397-2323.

[linnea.larocque@clark.wa.gov](mailto:linnea.larocque@clark.wa.gov)

**1.13. DURATION OF CONTRACT**

A contract awarded as a result of this RFP is intended to start as soon as possible and shall have a three-year term. Clark County reserves the right to extend the contract resulting from this bid for a period of two (2) one (1) year periods, with the same terms and conditions, by service of a written notice of its intention to do so prior to the contract termination date.

**1.14. TYPE OF CONTRACT**

Software application license

Product support and maintenance

Professional services for implementation

## **2. GENERAL REQUIREMENTS**

The successful vendor (Seller) will be required to enter into a written agreement with Clark County (County) in which the vendor shall undertake certain obligations. So that respondents can provide a reasonable cost and time estimate, the following terms and conditions are provided, and shall appear in similar form in the final negotiated contract.

### **2.1. RESPONSE TO THIS RFP**

Applicable portions of the Seller's proposal response to this RFP shall be included in the written contract.

### **2.2. INDEPENDENT PRICE DETERMINATION**

The prospective contractor guarantees that, in connection with this proposal, the prices and/or cost data have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition. This does not preclude or impede the formation of a consortium of companies and/or agencies for purposes of engaging in jointly sponsored proposals.

### **2.3. PRICE WARRANT**

The proposal shall warrant that the costs quoted for services in response to the RFP are not in excess of those which would be charged any other individual or entity for the same services performed by the prospective contractor.

The pricing and labor rates provided in the Seller's proposal response to this RFP shall be considered valid, for the purposes of contract negotiation, through January 31, 2006. Clark County understands and expects total price to change, should negotiations result in a change in scope.

### **2.4. AUTHORSHIP**

Applicants must identify any assistance provided by agencies or individuals outside the proposer's own organization in preparing the proposal. No contingent fees for such assistance will be allowed to be paid under any contract resulting from this RFP.

All proposals submitted become the property of Clark County. It is understood and agreed that the prospective contractor claims no proprietary rights to the ideas and written materials contained in or attached to the proposal submitted.

### **2.5. CONFLICT OF INTEREST**

All proposals submitted must contain a statement disclosing or denying any interest, financial or otherwise, that any employee or official of Clark County or the appropriate Advisory Board may have in the proposing agency or proposed project.

### **2.6. SUBCONTRACTING**

Such intent to subcontract shall be clearly identified in the proposal. It is understood that the contractor is held responsible for the satisfactory accomplishment of the service or activities included in a subcontract.

**2.7. CONSORTIUM OF AGENCIES**

Any consortium of companies or agencies submitting a proposal must certify that each company or agency of the consortium can meet the requirements set forth in the RFP.

**2.8. EQUAL OPPORTUNITY**

It is the policy of Clark County to require equal opportunity in employment and services subject to eligibility standards that may be required for a specific program.

No person shall, on the grounds of race, color, religion, sex, handicap, national origin, age, citizenship, marital status, political affiliation or belief, be denied employment or benefits, or be discriminated against as a consumer, administrator or staff person under any program or activity receiving funds under this RFP.

In compliance with Department of Labor Regulations implementing Section 504 of the Rehabilitation Act of 1973, as amended, no qualified handicapped individual shall be discriminated against in admission or access to any program or activity.

The prospective contractor must agree to provide equal opportunity in the administration of the contract, and its subcontracts or other agreements.

**2.9. AWARD OF CONTRACT**

The contract award will not be final until Clark County and the prospective contractor have executed a contractual agreement. The contractual agreement consists of the following parts: (a) the basic provisions and general terms and conditions, (b) the special terms and conditions, (c) the project description and goals (Statement of Work and Schedule of Deliverables), (d) the budget and payment terms and (e) specific project deliverables. Clark County is not responsible for any costs incurred prior to the effective date of the contract. Therefore, the proposal should be submitted in final form from a budgetary, technical, and programmatic standpoint.

**2.10. DEBARMENT AND SUSPENSION**

The contractor must certify that they are not debarred or suspended or otherwise excluded from or are ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension". The contractor must also certify that it will not contract with a subcontractor that is debarred or suspended.

**2.11. LIMITATION**

This RFP does not commit Clark County to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or contract for services or supplies. Clark County reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with all qualified sources, to waive formalities, to postpone award, or to cancel in part or in its entirety this RFP if it is in the best interest of Clark County to do so.

**2.12. ADMINISTRATIVE REQUIREMENTS**

Contractors shall comply with all management and administrative requirements established by Washington Administrative Code (WAC), the Revised Code of the State of Washington (RCW), and any subsequent amendments or modifications, as applicable to providers licensed in the State of Washington.

**2.13. AUDIT/MONITORING REQUIREMENTS**

Any contract awarded as a result of this RFP includes an agreement by the successful Proposer to have performed an annual audit of its financial statements, which have been compiled in compliance with United States Generally Accepted Accounting Principles, and performed in accordance with Generally Accepted Auditing Standards. Such audit shall be remitted to the County on an annual basis for the year of the engagement, and two successive years after completion of this engagement.

In addition, auditing or monitoring for the following purposes will be conducted at the discretion of Clark County for:

- a. Cost applicability and reasonableness to this contract and proposed budget;
- b. Contract compliance; and
- c. Program performance.

**2.14. LIABILITY INSURANCE REQUIREMENTS**

Seller shall maintain throughout the term of the contract, at its own expense, and shall require any and all of its subcontractors to maintain throughout the term of the contract at their own expense, commercial general liability insurance covering property and bodily injury, with aggregate limits of not less than \$1,000,000 combined single limit.

Seller shall provide evidence of such insurance by submitting an insurance certificate provided on a standard "ACORD" or comparable form. Copies of all such policies shall be furnished to Clark County upon execution of contract.

**2.15. PROFESSIONAL LIABILITY (ERRORS AND OMISSIONS) INSURANCE**

Seller shall maintain throughout the term of the contract, at its own expense, and shall require any and all of its subcontractors to maintain throughout the term of the contract at their own expense, professional liability (errors and omissions) insurance in an amount of not less than \$2,000,000.

Seller shall provide evidence of such insurance by submitting an insurance certificate provided on a standard "ACORD" or comparable form. Copies of all such policies shall be furnished to the Clark County upon execution of contract.

**2.16. WORKER'S COMPENSATION**

Seller, and all of its subcontractors, shall also provide Worker's Compensation insurance in the amounts required by Washington state law, and employer's liability insurance in an amount not less than \$500,000.

**2.17. PATENT INFRINGEMENT WARRANTY**

Seller warrants that none of the goods, the use thereof, or any of the applications, processes or designs employed in the manufacture thereof infringes the valid claims of any letter patent, patent application, copyright, trade secret or any other property right of any third party. If as a result of any suit or proceeding alleging an infringement of any of the foregoing property rights Clark County's use of the goods is enjoined, Seller shall at no cost to Clark County either obtain for Clark County a license to use the goods or modify the goods so as to avoid the infringement without any degradation in performance. If Seller cannot obtain such a license and cannot so modify the equipment, Seller shall promptly refund to Clark County the full purchase price.

**2.18. PATENT INDEMNITY**

Seller shall defend, indemnify and hold harmless Clark County, Clark County's commissioners, officers, employees, and agents, from and against all legal expenses which may be incurred as well as all damages, losses and costs which may be assessed against or borne by Clark County by reason of any or all actions or proceedings charging infringement of the property rights of others, including patent, trade secret or trademark rights or copyright, by reason of Clark County's use of the goods provided under this contract.

**2.19. INDEMNITY/HOLD HARMLESS**

The Seller shall defend, indemnify and hold Clark County, its commissioners, officers, employees, and agents, harmless from any liability imposed for injury or damage, whether arising before or after completion of work or arising out of Seller's, or its subcontractor's, performance of the contract.

**2.20. PAYMENT, SCHEDULE OF VALUES, ACCEPTANCE**

Payment of the Seller's contractually specified charges for proper contract performance— to include any software licensing charges and successful implementation of project deliverables—will be made within 30 days of receipt of Seller's invoice and in accordance with the schedule of values. Receipts for all reasonable travel and other expenditures shall be required. Reasonable rates will be set during contract negotiations. Mobile-phone charges will not normally be considered for reimbursement. See below for a description of material supply responsibilities.

Clark County may withhold partial payment, not to exceed 30% of the total project cost, to secure successful performance of all requirements of the Seller's contract. The withheld amount will be paid within 60 days after the Seller makes final delivery and Clark County accepts delivery, as described in the contract.

A Schedule of Payments will be set forth in the contract for all of the work to be performed and deliverables to be provided. The Schedule will identify the specific functionality, integration, implementation requirements and necessary training, and set the price for each work item or deliverable, and further define each deliverable as needed. The schedule of Payments, when added together, will equal the contract price less any withheld payment (see paragraph above) and will subdivide the work into component parts in sufficient detail to serve as the basis for progress payments.

A process will be defined that allows Clark County to communicate acceptance, exceptions, and errors to Seller. Written acceptance by Clark County will be mandatory prior to authorization of any payment listed in the Schedule of Values.

### **2.21. EQUIPMENT AND MATERIAL**

The contract will require the Seller to supply for its employees and subcontractors, all computers, software and other non-office supply material required to complete the work on time.

Clark County will supply workspace, reasonable local and long-distance telephone services, copy and fax machines/services, and miscellaneous office supplies.

Clark County will furnish any and all computer hardware, networking, and operating system upgrades that may be needed to support the selected solution. An outline of Clark County's current hardware and software infrastructure is provided in this RFP.

### **2.22. PERSONNEL**

The contract will contain language stating that Clark County reserves the right to request the removal of any Seller employee from the project and Seller agrees to, in good faith, comply, to the maximum extent possible, with such a request. The parties agree that the individuals designated in the Scope of Work are essential to the services offered pursuant to this Agreement. The parties agree that:

- Vendor shall not transfer or reassign such individual or individuals without the express written agreement of the County; which agreement shall not be unreasonably withheld. Should Vendor no longer employ such individual or individuals during the term of this Agreement, Vendor shall present to the County an individual with greater or equal qualifications as a replacement subject to the County's approval, which shall not be unreasonably withheld. The County's approval or disapproval shall not be construed to release Vendor from its obligations under this Agreement.
- The County shall have the right to have background checks conducted on all on-site Vendor staff. Vendor agrees to cause staff to which Vendor makes available (as permitted by this Agreement) Confidential Information, to agree in writing to observe and perform all provisions of this section applicable to such Staff, including without limitation agreeing to comply with the confidentiality and use limitations for Software licensed or purchased by the County. Vendor will maintain up-to-date documentation indicating compliance with the County security and confidentiality requirements governing software, network access, data use and access to physical space within the County. Such documentation shall be provided to the County promptly upon request.

### **2.23. RIGHT OF COUNTY TO REJECT VENDOR EMPLOYEES**

The County shall have the right to reject any of the Vendor's employees whose qualifications or performance is unsatisfactory in the County's good faith and reasonable judgment. The Vendor shall replace rejected employees with qualified employees promptly so as not to cause unreasonable delays in the project schedule.

**2.24. SOURCE CODE**

The contract will contain language reflecting the agreement of Seller to place Clark County's version of the licensed software into escrow, or to provide a copy of Clark County's source code to Clark County for retention. Escrow or retention of the licensed software will be maintained current to that installed at Clark County.

**2.25. CONFIDENTIALITY**

Seller agrees that only documents or products physically identified by Seller as "Confidential" shall constitute Confidential or proprietary work product. Seller acknowledges that the County is a municipal corporation bound by the public disclosure laws of the State of Washington and that under Washington law Clark County is required to make available all non-exempt public records for inspection and copying.

Seller agrees that in the event Clark County receives a disclosure request for any document identified by Seller as Confidential, Clark County's sole obligation is to provide Seller 10 days notice prior to disclosing the document. If the Seller desires to block the disclosure of said document, it shall seek injunctive relief in the Superior Court of Clark County within the 10 day notice period. In the event that Seller fails to seek, or is unable to obtain injunctive relief, Seller understands that the County will disclose the requested document.

**2.26. CANCELLATION OF AWARD**

Clark County reserves the right to immediately cancel an award if the contractual agreement has not been entered into by both parties or if new state regulations or policy make it necessary to change the program purpose or content, discontinue such programs, or impose funding reductions. In those cases where negotiation of contract activities are necessary, Clark County reserves the right to limit the period of negotiation to sixty (60) days after which time funds may be unencumbered.

**2.27. TERMINATION**

The contract will contain language stating that Clark County reserves the right to reduce the scope of work, or terminate the project in its entirety, without cause or penalty. In the event of termination, the Seller will be paid for all work executed and any direct expense incurred.

### 3. SCOPE OF RFP

#### 3.1. OVERVIEW

Clark County is seeking a software solution encompassing the business areas listed on the following pages. This solution requires full integration—to the extent possible—with other related software applications used by the County.

We understand that some proposers may not offer full functionality as listed in this section. Proposers are encouraged to propose any or all of the functional areas. Additionally, the County encourages “partnering” by proposers, provided the prime and sub-contractors are appropriately identified. Whichever form the partnership takes, please keep in mind that the County’s prime objective is to have an integrated, centralized solution.

The groupings below should communicate business needs—not suggestions on how the County desires the software to be “bundled” or “modularized.”

#### 3.2. FUNCTIONAL AREAS

The application(s) must be able to support continuous change dictated by changing public mandates, laws and RCWs. For purposes of this RFP, we have organized our functional requirements into the following categories and subcategories:

<p><b>Appraisal-Real Property</b></p> <ul style="list-style-type: none"> <li>• Requirements for all property types</li> <li>• Appraisal Tables</li> <li>• Commercial</li> <li>• Data Characteristic</li> <li>• Photos and Sketches</li> <li>• Physical Inspections and Data Collection</li> <li>• State Assessed Utilities</li> <li>• Valuation</li> <li>• Value Notifications</li> <li>• What-if Calculations</li> </ul>	<p><b>Appraisal – Personal Property</b></p> <ul style="list-style-type: none"> <li>• Requirements for all Accounts</li> <li>• Audit</li> <li>• Farm Exemption</li> <li>• State-assessed Utilities</li> <li>• Tables</li> <li>• Valuation</li> <li>• Value Notifications</li> </ul>
<p><b>Assessments</b></p> <ul style="list-style-type: none"> <li>• General Assessments</li> <li>• Clean Water</li> <li>• CRID</li> <li>• DNR-Fire Patrol</li> <li>• Drainage</li> <li>• Lighting</li> <li>• Water Utility</li> </ul>	

<p><b>Creation of Taxes, Maintenance, and Billing</b></p> <ul style="list-style-type: none"> <li>• Levy Certification             <ul style="list-style-type: none"> <li>➢ Calculating Levies</li> <li>➢ Taxing District Notifications</li> <li>➢ Training Databases</li> <li>➢ What if Mode</li> </ul> </li> <li>• Certification of Taxes and Creation of Assessment and Tax rolls</li> <li>• Cancellations and Supplements</li> <li>• Combinations</li> <li>• Segregations</li> <li>• Judgments</li> <li>• Annexations</li> </ul>	<ul style="list-style-type: none"> <li>• Tax Relief             <ul style="list-style-type: none"> <li>➢ 30% Homesteaders Exemption</li> <li>➢ Destroyed Property</li> <li>➢ Historic and Multi-Family Tax Abatement</li> <li>➢ Senior citizen and disabled Property Owners</li> </ul> </li> <li>• Creation of Tax Assessment Fees &amp; Bills</li> <li>• Current Use Assessments             <ul style="list-style-type: none"> <li>➢ General Requirements</li> <li>➢ Applications</li> <li>➢ Appraisal</li> <li>➢ Removals</li> </ul> </li> <li>• Board of Equalization</li> <li>• Value Appeal Response and Call Tracking</li> </ul>
<p><b>Tax Collection</b></p> <ul style="list-style-type: none"> <li>• Receipting</li> <li>• Collections             <ul style="list-style-type: none"> <li>➢ Distraint</li> <li>➢ Foreclosure</li> <li>➢ Miscellaneous third-party assignment, bankruptcy, etc.</li> </ul> </li> <li>• Paid Under Protest</li> <li>• Advance Taxes             <ul style="list-style-type: none"> <li>➢ Personal Property</li> <li>➢ Real Property</li> </ul> </li> <li>• Current Use Removals</li> <li>• Payments in Lieu of Taxes</li> <li>• Refunds</li> <li>• Mobile Home Movement Permits</li> </ul>	<p><b>Tax Accounting</b></p> <ul style="list-style-type: none"> <li>• Distribution</li> <li>• Tax Roll</li> <li>• Tax Remittance</li> <li>• Accounting and Maintaining Property Tax Receivables</li> <li>• Accounts Receivables for Fees and Assessments</li> <li>• Overlapping Debt</li> </ul>
<p><b>GIS</b></p>	<p><b>Sales Transaction Management</b></p> <ul style="list-style-type: none"> <li>• Excise/REET</li> <li>• Sales Database</li> <li>• Land Records Management             <ul style="list-style-type: none"> <li>➢ Legal Descriptions</li> <li>➢ New Subdivisions</li> <li>➢ Transfers</li> </ul> </li> <li>• Record Maintenance             <ul style="list-style-type: none"> <li>➢ Addresses</li> <li>➢ Annexations</li> <li>➢ Owner Names</li> <li>➢ Tables other than Appraisal Tables</li> </ul> </li> </ul>
<p><b>Customer Service Inquiry</b></p> <ul style="list-style-type: none"> <li>• Customer Information</li> <li>• Customer Self-Service</li> <li>• Customer Service</li> <li>• History</li> </ul>	<p><b>Global Application Requirements</b></p> <ul style="list-style-type: none"> <li>• System Design and Features</li> <li>• Reports</li> <li>• Interfaces and Integration</li> <li>• General Functional Requirements</li> </ul>

The purpose of these groupings is to organize our concepts and improve our ability to understand and evaluate proposer responses. They are not intended to suggest software design or architecture.

### 3.3. VISION – GENERAL

The mission of this project is to improve Assessment, Taxation and GIS services to the people of Clark County by replacing legacy software, substantially reducing systemic gaps, overlaps, fragmented/duplicated data, and by increasing staff ability to accommodate an increasing workload.

#### 3.3.1. Outcomes of Project Success – Business

- Assessment, Taxation, and GIS services to the people of Clark County have been improved through:
  - Extensive access to data.
  - Improved customer service responsiveness and accountability.
  - Improved assurance and data integrity.
- Staff effectiveness has been improved for all three departments.
- Systemic gaps, overlaps fragmented/duplicated data have been identified and substantially reduced.
- The new application(s) supports the business objectives of both the Assessor and Treasurer.
- Customer service initiatives of both departments have been advanced.
- Staff hours spent on yearly transitions and quality assurance cross-reference checks have been reduced.
- Business processes have been improved by adopting industry standard “best practices”.
- Reporting capabilities have been improved—particularly in fiscal management. Department managers and supervisors are able to effectively and easily manage with accurate report information.
- Plans have been implemented for the ongoing staffing needs required to maintain and operate the new application(s), including staff knowledge and skills development, and the number, training and timing of staffing resources.

#### 3.3.2. Outcomes of Project Success – Technology

- Legacy mainframe applications supporting the Assessment, Treasury and GIS departments have been replaced.
- Many, if not all, of the current small, patchwork databases, spreadsheets and other tools have been eliminated.
- Normalization, reliability and accuracy of all transactional and financial data have been improved.
- High-quality, ubiquitous technology, with proven standards for infrastructure and data management, have been implemented.
- Previous Internet functionality has been exceeded.
- Use of wireless devices is supported.

- Interfaces have been designed and implemented, improving the links to other databases and applications, such as Imaging, GIS, Permitting, and the County financial application.
- The new applications are based on proven technology, forming a stable and expandable platform for the priority business processes of both the Assessor's and Treasurer's Offices.
- Automated processing ensures quality of data, and accurate/timely output of information to both internal and external customers.
- Successful knowledge transfer to the functional and technical support staff has been accomplished.

### **3.4. VISION – GIS AND CAMA INTEGRATION**

The GIS database and the Assessor's database are key components of the County's knowledge base. The two databases are interrelated and interdependent. The CAMA database will include attributes that are populated and maintained by the GIS. The GIS parcel layer and building foot print layer will contain primary keys that relate to the CAMA database. One goal for Clark County is to develop seamless integration between its GIS and CAMA applications. Seamless integration between the GIS and CAMA applications should occur in two areas—database maintenance and inter-application communication.

#### **3.4.1. Database Maintenance**

Clark County is committed to eliminating the duplication of information gathering and maintenance. For this type of integration to work the keeper of a data element must be able to meet the requirements of all of the users of that data element. CAMA based examples of this are the Situs Address database and the Building Footprint/Building Sketch database.

#### **3.4.2. Addressing**

The CAMA application is considered the primary source of situs address information for Clark County. As such the CAMA address database must support the addressing requirements of 911, schools, utilities, animal control, and building permits.

- Addresses must be linked to a building.
- Buildings must be linked to a parcel.
- Buildings must allow multiple addresses.
- Addresses must meet postal standards.
- Addresses must contain a unique identifier.
- Buildings must contain a unique identifier.

#### **3.4.3. Building Footprints**

The CAMA application will be used to capture building sketches including building footprints. The footprint portion of the building sketch (First Floor) must be exportable to a vector format that can be imported into the GIS. Preferably, the CAMA application will store building location and orientation information to automate updating the GIS building footprints when sketches are updated.

Integration of the County's information systems requires the ability to readily share information between information systems in real-time interactive mode and batch update. The interfaces between the CAMA applications must be designed so that they can be easily modified by Clark County.

The CAMA application should be able to interact with the GIS to update individual records in a real time basis. Examples of this are:

- Defining current use polygons within a parcel using the GIS. Saving these records in GIS would trigger an update of the CAMA application that would reflect the acreage of these polygons and the breakdown by soil type.
- When acreage parcels are created in the GIS the slope classifications by acre are uploaded into the CAMA application.
- When subdivision parcels are created in the GIS the lot square foot values are uploaded to the CAMA application.

The CAMA application should be able to interact with the GIS to update batches of records at specific times. Examples of this are:

- When annexations are adopted the municipality and tax code areas are updated in the CAMA.
- Zoning values are updated based on the GIS zoning layer as of January 1 each year.

#### 3.4.4. GIS and CAMA application integration

Application level interaction between the CAMA and GIS provides the appraiser with the ability to select a parcel or parcels using a GIS viewer and to pass that selected set of records to the CAMA for further processing or analysis. Application integration should also allow the appraiser to pass the selected set of records from the CAMA application to a GIS viewer.

Clark County has developed a suite of GIS viewers using ArcView 3.x, MapObjects, ArcGIS 9.x, ArcIMS and MOIMS. It is our preference that we are able to leverage our existing and future applications as viewing tools for the CAMA application. The inter-application communication architecture should be such that the information passed can be easily modified by Clark County.

CAMA applications with an integrated viewing tool must meet the following criteria:

- The application should be based on ESRI software tools.
- The application must be able to operate offline with local data. (On a laptop in the field).
- Clark County must be able to define layers and symbology.
- The application must support shapefiles and SDE data sources.
- The source code for the GIS Viewer shall be available to Clark County.

### 3.5. VISION – ASSESSMENT APPLICATIONS

The information collected, maintained, and used by the Assessor, Treasurer, and GIS forms the foundation upon which nearly all assessment functions are built. Maintaining and enhancing the use of this data will be the primary function of the new application(s).

In the past, the size, complexity, and value of this information base created an inertia that influenced and sometimes dictated work programs, processes, and efficiencies. Our goal for the new ATS application and its assessment applications is to better manage and utilize the value of our data, as well as leverage the power and flexibility of current hardware and software applications, in completing our work and fulfilling our statutory responsibilities.

Simply put, the goal is to automate as much of our work as can be automated in order to increase productivity.

Tight integration among all elements of the ATS application, including Assessor, Treasurer, GIS, and interfaces from other applications, such as Tidemark, provide a fertile environment for innovation and change. Important outcomes include:

- Appraisals will be as close to market values as possible.
- Information generated using the application will be uniform and predictable.
- The application will be easily understood and used.
- System elements will allow flexibility to meet changing County needs.
- The County's investment in data and data relationships will be protected, and data redundancy will be reduced.
- Independent programs and processes now employed by County staff will be incorporated into the overall system design.
- Customer service will be maintained and improved, including the timeliness, accuracy, and availability of information to the public.
- Seamless integration of processes from inception through completion, regardless of department.

The ATS application will provide access in a manner that will build public confidence in the accuracy of the data, and educate the public about the department's products and procedures.

Program functions and assessment tools will allow greater productivity and higher accuracy than the current application. Assessment functions for residential, commercial, industrial, multifamily and personal property will allow:

- Multiple appraisal methods and approaches.
- Statistical adjustments of property values.
- Maintenance of multiple years of data, both past and future.
- Use of portable computers and/or PDAs to store, exchange, transmit, download, and upload data.
- Compatibility with special assessment programs, including the current use program and senior citizen and disabled persons exemption and deferral programs.

- Auditing to ensure completeness and accuracy of data entry, appraisals, and other program functions.
- Maintaining high uniformity of assessed values to ensure equity within and among property classes.
- Expanding opportunities for public use of departmental programs, products, and services through the Internet and Web-based programs.
- Flexibility to adapt to changes in laws and regulations governing assessment and taxation in a complete, accurate, and timely manner.

### **3.6. VISION – TREASURER’S OFFICE APPLICATIONS**

The vision of the Clark County Treasurer’s Office is to implement an application that incorporates web-based geographic information at its core. The new application will include specific integration between property assessment/valuation, and taxation and local improvement district applications. The application will have the ability to support multiple agencies both internal and external to the County. The new application, at a minimum, must exceed our current processing capabilities. A major goal of the new application is to provide public Internet access. The web functionality would provide for the query of public data and the online submission of account documentation.

Departmental goals for the new Treasury applications include:

- Effective internal controls and audit checks.
- Reduced reconciling and manual processes.
- Integrated collections so all staff have information on the status and are able to take appropriate action on foreclosures, bankruptcies, distraints, and NSF’s.
- Customer management functions (front-desk and phone) that provide accurate status of an account. The screen will provide the total amount due on the property account no matter what type of fee, tax or charge. The application can attach notes, e-mails, Word documents, images of records to the account number, and archive when necessary. It will also track customer requests and inquiries.
- Data will be entered once (documented who entered the data) including from the web site.
- True integration between GIS (ARCVIEW) and the new applications.
- Clear, easily-modified explanations on form letters and on statements.
- One statement for all types of charges, fees and taxes.
- Ability to distribute monies on a daily basis.
- Ability to pay taxes electronically (web or phone) by means of the Point-of-Sale application.
- Ability to integrate with Oracle Financial Management.
- Ability to integrate with a Point of Sale Application.
- Ability to provide electronic reports.

### 3.7. INTERFACES

The selected proposer will be expected to work with our Information Services (IS) department employees to integrate the selected software into selected internal County software applications.

Required and optional interfaces are described in the Appendix entitled “Interfaces.” Additional clarification of the existing relationships between the legacy applications can be found in the two appendices entitled “Current Software Overview.”

**NOTE:** Not all interfaces listed in the appendix are mandatory. Our preference is to select a solution that replaces many of the small legacy databases, making those interfaces unnecessary. If your solution does not address functionality provided by those legacy databases, interfaces may be required in order to maintain the current level of systemic integration.

### 3.8. DATA CONVERSION

The County intends to convert all existing records and historical data for use in the new system. The County will seek recommendations from the vendor on data conversion needs and alternatives.

GIS maintains data back to 1993.

Sample data diagrams are provided in the appendices entitled “Mainframe Data Architecture” and “Data Conversion Guidelines” of this RFP, and are intended for your evaluation and use as assumptions in preparing your proposal and cost estimates.

### 3.9. TRAINING

The following types of training are desired and should be included in the response to this RFP:

- End user training, such as:
  - Record inquiry, data entry, and similar routine operations
  - Valuation functions (market and special use)
  - Production of state-mandated reports
  - Adjustments and notices
  - Year-end and other periodic processing
  - Integration/interfaces with other applications
- System administration training, such as:
  - Knowledge transfer of system configuration and set-up
  - Operations and maintenance systems programming training
- Interfacing with other systems and programs, particularly ESRI GIS products
- Routine, ad hoc, and statistical analysis report creation training

Clark County shall provide an equipped training facility sufficient to train up to 12 individuals simultaneously. We prefer that the training be conducted at our facilities in Vancouver, but will entertain travel to another class convening location, if needed.

**3.10. IMPLEMENTATION/CONFIGURATION/CONSULTATION**

Clark County is requesting full support in its implementation of the chosen solution. The following activities, as applicable to your proposed solution, should be included.

- ✓ Table and system set-up and configuration options.
- ✓ Fit-gap and best practices for use of your solution.
- ✓ Security design and set-up.
- ✓ Configuration of interfaces with other applications.
- ✓ Best practices for GIS configuration and use.

**3.11. PROJECT MANAGEMENT AND SUPPORT**

Clark County expects the selected vendor to name an overall project manager for the project, provide onsite project management when needed, and produce and maintain the overall project implementation plan and schedule. The County will also provide a project management team to coordinate internal resources, facilitate communication at all levels, facilitate decision-making and provide oversight and auditing.

Other elements related to project support include:

- ✓ Status reports.
- ✓ Meeting facilitation, issue resolution, etc.
- ✓ Documentation of changes, required actions, decisions, etc.
- ✓ Conducting management briefings.
- ✓ Identification, mitigation planning, and research for any identified risks.
- ✓ Support and participation in project communication activities.

**3.12. USER COUNTS**

The following information is provided as needed for cost estimation of seat licenses and training requirements.

<b>Type</b>	<b>Count</b>
Superusers / Experts	12
Day-to-day internal users	110
Inquiry-only	200

**3.13. HARDWARE & OPERATING SYSTEMS**

No hardware is sought in this RFP. Any server upgrades or purchases will be performed under a different procurement process. However, Clark County requires that proposers specify recommended hardware requirements in a later section of this RFP.

**3.14. DOCUMENTATION**

Complete technical and end-user documentation must be included in the proposals. See the “Technical Requirements” Section of this RFP for further details.

**3.15. TIMELINE**

Clark County plans to begin implementation as soon as possible. Support for the existing mainframe hardware platform will be withdrawn by the current hardware vendor in December of 2006, so that is our definite, firm deadline for all work to be completed.

#### 4. PROPOSAL DEVELOPMENT—INFORMATION AND INSTRUCTIONS

In order to maintain the fairness and integrity of the selection process, it is essential that the proposal conform to the requirements of this section. Do not include any material that is not specifically requested. Elaborate art work, expensive paper or bindings, and expensive visual or other presentations are neither necessary nor desired. Failure to follow the instructions in this section may result in disqualification. Clark County desires a concise, direct, and easily interpreted response.

The proposal must enable readers to understand how the Proposer intends to use public funds and what measurable outcomes are expected to be achieved. Proposers are reminded that proposals will be considered exactly as submitted. Points of clarification will be solicited from proposers at the discretion of Clark County.

The information and proposed budget for the Vendor selected for contract award will form the basis for negotiation of a contract. Clark County reserves the right to issue a contract without further negotiation using the data contained in the RFP. Failure of a prospective contractor to accept this method of contract development will result in cancellation of the award.

##### 4.1. RESPONSE TO QUESTIONS

Please adhere to the following guidelines when responding to the questions in this RFP. These guidelines are provided to help Clark County reviewers more accurately obtain the information needed for their evaluation.

- ✓ When answering a specific question, **DO NOT** refer the reviewer to an enclosed brochure, report, or other document. Please respond by providing a concise, simple and clear answer to the question.
- ✓ Include the question reference number and the question with your response.
- ✓ If you feel a reference must be made to another document or paragraph in the proposal, **INCLUDE A PAGE NUMBER AND PARAGRAPH REFERENCE**, and any other reference indicator that you feel will enable the reviewer to access the information.
- ✓ If you choose NOT to answer a question, so indicate by writing “Not Applicable,” or otherwise indicating the reason for non-response.

##### 4.2. PROJECT SCHEDULE

- ✓ Request for proposals posted ..... 3/18/05
- ✓ Deadline for proposer questions .....4/1/05, 12:00PM PT
- ✓ Proposer Q&A conference (phone conference number will be provided) ..... 4/6/05
- ✓ **Proposals due.....4/22/05, 4:30PM PT**
- ✓ Preliminary evaluations completed/finalists notified..... 5/24/05
- ✓ Finalist survey/demonstration period..... 6/8/05 – 6/29/05
- ✓ Site visits..... As soon as practical
- ✓ Clark County selection(s) made..... As soon as practical
- ✓ Contract negotiations & gap analysis ..... As soon as practical
- ✓ Implementation project start ..... As soon as practical
- ✓ Live on new system(s) ..... As soon as practical

### 4.3. FORMAT INSTRUCTIONS

#### 4.3.1. Style

- ✓ All proposals should use common, easily readable and available fonts such as Times New Roman in 12 point or larger type-size.
- ✓ Each page shall contain at least a one-inch margin on all sides.
- ✓ All text and graphics should be easily reproducible in black and white.

#### 4.3.2. Structure

- ✓ All pages shall be numbered.
- ✓ Major sections shall have a page break between them and the next section.
- ✓ The following sections shall be included:
  - I) Proposal Response Form, Cover Letter/Introduction
  - II) Company Background and Overview (Limit to 5 pages)
  - III) Technical Requirements (Limit to 15 pages)
  - IV) Functional Requirements and Specifications (Limit to 100 pages)
  - V) Implementation and Management Approach (Limit to 15 pages)
  - VI) Support and Maintenance (Limit to 15 pages)
  - VII) Cost Proposal (Limit to 5 pages)
  - VIII) References (Limit to 2 pages)
- ✓ The total page-count of 162 pages DOES NOT INCLUDE cover pages, table-of-contents, etc., or license agreements and other similar requested samples. An Executive Summary, or similar, IS NOT DESIRED—the cover letter may be used for summary purposes.
- ✓ If you do not need all of the pages in a given section (e.g., only need 3 of a 5 page limit), you MAY NOT use the remaining page-count in another section.

### 4.4. COPIES AND SUBMISSION

- ✓ Paper—one (1) signed original, and ten (10) copies are required. Proposals received with insufficient copies cannot be properly disseminated to the Review Committee and other reviewers for necessary action, and therefore may not be processed.
- ✓ Three-ring binders are the required binding format. No special covers are needed. PLEASE SUBMIT THE ORIGINAL AND ALL COPIES BOUND ONLY BY A THREE-RING BINDER.
- ✓ Additional support documents, such as sales brochures, should be included in the three-ring binder.
- ✓ Additional delivery by e-mail shall be made in Microsoft Word. If Word is not available, delivery shall be made in other common text handling format. It is not necessary to deliver demonstrations/samples by e-mail—only the textual proposal. Confirmation of e-mail receipt prior to the deadline is the responsibility of the proposer.
- ✓ Demonstrations/samples—at least five (5) copies of any demonstration media, documentation samples, or other enclosures shall be included if requested. Unless

requested in other parts of this RFP, additional materials are neither required, nor desired.

- ✓ At least one (1) signed original of the *proposal response form*, found in Appendix A, shall be included in the unbound original submission. An authorized representative, from each and every company that may become part of the proposed solution, shall sign the form.
- ✓ Submission is considered to have been made when the package is received at the Clark County Purchasing Department (at the address below) prior to **4:30 P.M., Pacific Time on April 22, 2005.**
- ✓ Original documents and appropriate copies must be delivered to the Clark County Purchasing Department in a sealed package. Proposals shall be delivered in a sealed package(s) and clearly labeled:

**<Proposing organization name(s)>**

**Response to RFP #404**

**RFP for Assessment, Taxation Management & LID Software**

- ✓ Send all proposals to:

*If using courier:*

**1300 Franklin Street, 6<sup>th</sup> Floor  
Suite 650  
Vancouver, Washington 98660**

*If using US Mail:*

**P.O. Box 5000  
Vancouver, Washington 98666-5000**

Shipping/contact phone: (360) 397-2323

#### **4.5. PROPOSER INQUIRIES**

All inquiries will be made to:

E-mail: [linnea.larocque@clark.wa.gov](mailto:linnea.larocque@clark.wa.gov)

Phone: (360) 397-2323

(8:00 a.m. to 5:00 p.m. Pacific Time)

There will be a pre-bid conference beginning at at 1:00 p.m. (Pacific Time) on April 6th at the following location: 1300 Franklin Street, 6th floor (Training Room) Suite 679.

Proposers may participate by phone or in person. The purpose of the pre-proposal conference will be to answer questions pertaining to the RFP.

Proposer questions and resulting answers will be made available for viewing by means of the Clark County web site: [www.clark.wa.gov](http://www.clark.wa.gov) located in "Bid Information." We encourage proposers to submit questions via e-mail in advance of the conference call to allow the county team time to research and qualify our answers.

Proposer questions will not be answered after the date identified in the project schedule in section 4.2.

Note: All Appendices are available for viewing via FTP link.

To obtain access rights:

Contact Linnea La Rocque via phone or e-mail. (360) 397-2323.

[linnea.larocque@clark.wa.gov](mailto:linnea.larocque@clark.wa.gov)

#### **4.6. RFP NOT A BASIS FOR OBLIGATIONS**

This request for proposals does not constitute an offer to contract and does not commit Clark County to the award of a contract to anyone or to pay any costs incurred in the preparation and submission of proposals. Clark County reserves the right to reject any or all proposals that do not conform to the requirements stated in this document. Clark County reserves the right to cancel all or part of this request for proposals for any reason determined by Clark County to be in the public interest. Clark County reserves the right to request re-submitted proposals from finalists based on additional criteria that may be derived during the evaluation process. Clark County also reserves the right to negotiate with any or all prospective contractors on modifications to proposals.

#### **4.7. RIGHTS TO SUBMITTED MATERIALS**

All proposals and material submitted to Clark County by a proposer, in response to this RFP, shall become the property of Clark County after the proposal submission deadline. Clark County's return of the proposals/material will be subject to the requirements of the laws of the State of Washington.

#### **4.8. LATE PROPOSALS**

A proposal received after the date and time indicated above will not be accepted. No exceptions will be made.

**4.9. VERBAL PROPOSALS**

Verbal proposals will not be considered in making the award of any contract as a result of this RFP.

**4.10. DISPUTES**

Clark County encourages the use of informal resolution to address complaints or disputes arising over any actions in implementing the provisions of this RFP. Written complaints should be addressed to Clark County – Purchasing, P.O. Box 5000, Vancouver, Washington 98666-5000.

**4.11. COST OF PREPARATION**

All costs associated with the preparation, demonstration, presentation, negotiation, and delivery of the proposer's response to this RFP are the sole responsibility of the proposer. The County will not reimburse any proposer for any cost related to responding to this RFP. This invitation does not commit the County to pay any costs incurred in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the items required under the invitation.

**4.12. RIGHT TO REJECT PROPOSALS**

The County reserves the right to reject any proposal, or any part of a proposal, for any reason allowed under Washington law, at any time. The County reserves the right to solicit new proposals for the same products and services at any time.

**4.13. REJECTION OF PROPOSALS**

County reserves the right to reject any or all proposals received and to negotiate with any or all prospective contractors on modifications to proposals.

**4.14. RIGHTS TO SUBMITTED MATERIALS**

Any reports, studies, conclusions, and summaries prepared by the Proposer shall become the property of the County and will not be returned unless reasonable arrangements, at the Proposer's expense to do so, are made in advance.

**4.15. APPLICABLE LAW**

The laws of the State of Washington and Ordinances of the County shall govern this Agreement. The venue of any action thereunder shall be in the Superior Court for Clark County, Washington.

## 5. EVALUATION

Proposals received in response to this RFP will be evaluated by a Review Committee. Committee review results and recommendations may be presented to an appropriate advisory board prior to the consent process with the Clark County Board of Commissioners.

### 5.1. EVALUATION AND SELECTION CRITERIA

Each proposal received in response to the RFP will be objectively evaluated and rated according to a specified point system. Evaluation of proposers' written proposal will be structured according to the following criteria:

Proposer background and experience (proposal section 1)	15%
Technical specifications (proposal section 2)	5%
Ability to accommodate functional requirements and specifications (proposal section 3)	30%
Implementation and management approach (proposal section 4)	15%
Support and maintenance (proposal section 5)	10%
Installed and long-term maintenance costs (proposal section 6)	15%
Responses from vendor references (proposal section 7)	10%

The highest scoring proposers will be eligible for additional analysis and evaluation as described in the next section, subject to the approval of Clark County's management team.

### 5.2. ADDITIONAL EVALUATION STEPS

#### 5.2.1. Oral Presentation/Demonstrations

Upon completion of the written proposal evaluation phase, the highest scoring proposers will be offered an opportunity to make a presentation, and as applicable, demonstrate any software/hardware associated with their solution.

The presentation will take the form of "day-in-the-life" scenarios of Clark County processes. Clark County will create and provide the scripts and sample data for these scenarios. Proposers will be asked to demonstrate how their solution can be leveraged to support a Clark County process with an un-customized product. Proposers not utilizing County scripts and sample data relative to scenarios will be eliminated. The solution(s) demonstrated shall be the same as those proposed in response to this RFP.

Clark County will base the proposer's allotted presentation time upon the scope of each respective proposer's proposal.

Clark County will forward specific demonstration requests to presenting proposers.

#### 5.2.2. Site Visits

Arrangements will also be made for a Clark County team to visit locations where each finalist proposer has provided a solution similar to the one proposed.

## 6. COMPANY BACKGROUND AND OVERVIEW (PROPOSAL SECTION 1)

(Page Limit: 5 pages)

### **Instructions:**

In the following Section, please provide concise yet complete answers to each of the questions. If you choose not to respond to a question, please type "Not Applicable" and explain why you are not answering. You may compose your answers to encompass more than one question; however, if you do so, you must make it clear which questions are being addressed.

Note: We do not desire information about ad hoc report tools, database, operating system, or other "third-party" proposers that may provide base products.

You may include diagrams, examples, charts, etc., to answer the question.

The ID numbers at the end of each question are for internal Clark County use.

1. Provide your company information, as indicated below, for each primary software proposer, and each implementation proposer. (ID# 453)

ITEM	RESPONSE
Proposer Name	
Doing-Business-As (DBA) names	
Physical address, company headquarters	
Physical address, this project	
Website	
Point-of-contact (POC) name for this RFP	
Desk phone/voice-mail, POC	
Mobile phone, POC	
E-mail, POC	
Length of time in business	
Gross revenue for FY 2003 (in US dollars) or FY 2004, if available.	
Approximate percentage of gross revenue generated by implementation/licensing of proposed solution	
Total number of installed clients with the proposed software installed	
Number of County clients with proposed solution (or similar) installed. Include number of customers for each County.	

2. For each primary software and implementation vendor, provide at least ten (10) copies of the last annual financial report. If an annual financial report is not published, further characterize

the company's financial health in terms of annual growth in revenue and client base over the past five (5) years. (ID# 454)

3. For each primary software and implementation proposer, provide details (client information, reason for default, date, outcome or current status) regarding any and all contracts terminated for default, or that were terminated prior to full contract completion in the past five (5) years. Termination is defined as notice to stop performance due to the Client's decision. (ID# 455)
4. Provide a summary organization chart showing the major departments/organizational units of your company. Include the names of your company officers. Identify any employees with relationships to Clark County. (ID# 456)
5. Identify any installed sites in the State of Washington. When the State legislature mandates legislation changes or certain Departments of the State mandate regulatory changes that require reconfiguration of the application(s), is there a method for sharing the reconfiguration costs between the counties in Washington? (ID# 457)
6. Regarding the primary software applications included in the solution proposed, briefly describe the strategic direction and future plans you have for those products. (ID# 458)

## 7. TECHNICAL REQUIREMENTS (PROPOSAL SECTION 2)

(Page Limit: 15 Pages)

### **Instructions:**

In the following Section, please provide concise yet complete answers to each of the questions. If you choose not to respond to a question, please type "Not Applicable," and explain why you are not answering. You may compose your answers to encompass more than one question; however, if you do so, you must make it clear which questions are being addressed.

You may include diagrams, examples, charts, etc., to answer the question.

The ID numbers for each question are for internal Clark County tracking purposes.

1. List and describe the operating platform(s) on which your software solution can operate. On which platform are the majority of the installations? Which platform do you recommend Clark County use, and why? (ID# 459)
2. Provide a technical overview of your solution by completing the tables below. Add rows/categories if needed. (ID# 1110)

Specify the server configuration required to run the proposed solution.

Operating system(s) with version number	
Hard drive free space	
RAM	
Processor and speed	

Specify the workstation configuration required to run the proposed solution.

Operating system(s) with version number	
Hard drive free space	
RAM	
Processor and speed	

Specify the network configuration required to run the proposed solution.

Network protocol	
Capacity	
Speed	

Specify your recommended relational database product.

Database	
Version number	

3. Describe the technical and database administrator documentation that would accompany your solution. Provide two (2) copies of examples. (ID# 460)
4. For each primary software application (i.e., do not address third-party reporting software or the database application) being proposed, explain your policy regarding purchasing/retention of source code. Do you provide source code in escrow? Explain how Clark County's version of the source code is protected. If you have any special agreements that must be negotiated, please include copies (5 copies). (ID# 461)
5. What "canned" and "ad hoc" reporting capabilities are provided with your solution? Include a discussion of third-party and any custom software applications. Does your solution include a data dictionary or other similar end-user support? Provide a sample of the documentation that helps the user understand the data relationships to support the creation of ad-hoc reports (5 copies). (ID# 462)
6. Describe the typical, or expected, impact of your solution to the County's staffing level. Include assumptions, a discussion of how workload might change over time, and how individual duties might change. (ID# 463)
7. What strategies are used by your system to assure data integrity? (ID# 914)
8. Clark County's GL account code structure is documented in "Appendix M – Account Coding Structure." In functional terms (i.e., business areas, not tables or entities) describe where the account code is generally used in your solution, and if the structure shown above can be accommodated. What modifications will need to be made to your database or software application? (ID# 1108)
9. What method(s) for data back-up and archiving are supported by your solution? Include use of third-party tools, and any solution areas recommended for archiving. (ID# 465)
10. Describe how your solution supports the administration of application security. Include how it is configured, how groups or roles are used, what actions can or cannot be taken for various settings, etc. How discretely can it be set? (ID# 466)
11. Describe how your solution creates an "audit trail" when data is changed. Include the types of data for which a trail is created, and what is recorded (user ID, date, etc.) when the data is changed. (ID# 467)
12. Describe how your solution facilitates data searching for primary data (parcel, customer, etc.). Include use of wildcards, partial searches, like searching, case-sensitivity, Soundex, and amount of data returned. (ID# 468)
13. Describe how navigation from screen to screen in your solution maintains context. By context, we mean the primary focus or subject of the task being performed (e.g., parcel, customer tax statement, etc.) (ID# 469)
14. Describe the scalability of your product. Include a discussion of how performance changes, and where performance "bottlenecks" are typically encountered. What configuration or

- approach recommendations can you give to ensure acceptable performance of your solution?  
(ID# 470)
15. Describe how your solution can be used to support geographically disparate work locations. Are any modifications required? Are business processes impacted? (ID# 471)
  16. Describe the flexibility of the proposed system in accommodating customization by Clark County. Can Clark County add custom fields and tables? Can Clark County customize the GUI to allow users to edit or display custom fields and tables? Can Clark County add custom buttons or menu items to the GUI? What if any are the limitations for custom buttons or menu items? (ID# 751)
  17. Explain how your solution is compliant with the generally understood concept of “open architecture.” Is your solution ODBC compliant? If so, provide several examples of operational ODBC interfaces in other jurisdictions. (ID# 472)
  18. Describe the expected maximum (longest) transaction speed for your solution (assumptions welcomed). List the primary factors that impact your transaction speed. List the user interfaces that are typically the slowest in your solution. (ID# 473)
  19. List all of the "important" user-configurable features of your solution. Include items such as screen color, list configuration, pre-defined screen flows (navigation), book-marks, etc. (ID# 474)
  20. Does the Application allow Clark County to add custom fields and tables? (ID# 1116)
  21. Does the Application allow Clark County to add custom buttons and menu items to the GUI? (ID# 1117)
  22. Include other technical information that you believe pertinent to this RFP. (Application flowcharts and work process diagrams are strongly encouraged.) (ID# 475)

## 8. FUNCTIONAL REQUIREMENTS AND SPECIFICATIONS (PROPOSAL SECTION 3)

(Page Limit: 100 Pages)

This section requires proposers to identify the features and functions supported by their product(s). Please answer as clearly and honestly as possible. Your answers will be used to evaluate your proposal, but will also be referenced in any resulting contract. Any misrepresentation of your application’s capabilities will result in disqualification or breach of contract.

### 8.1. FUNCTIONAL OVERVIEW, QUESTIONS AND SPECIFICATIONS

The County has organized this section of the document according to the functional subject areas previously described in the “Functional Areas” subsection of the “Scope of RFP” section of this document. We have broken our Functional Requirements into three categories:

- *Functional Specifications* – These items are contained in tables and intended for streamlined response according to the “Specification Instructions” below.
- *Essay Questions* – These items were considered too complex to represent as a simple specification.
- *Supplemental Demonstration Questions* – These questions are important to our selection of a solution, but responses are not required in your proposal. Vendors selected as finalists will be required to provide answers to many of these questions through scripted product demonstrations or in writing. Draft versions of these questions can be found in Appendix N.

#### **Specification Instructions:**

For each of the following sample specifications, indicate your proposed solution’s ability to provide the related functionality. To respond, you need only enter the code (A-F) in the “Vendor Response” column. Please consider the range of “work-hours” to include all stages of development (i.e., analysis/design, development, testing, implementation and documentation). Below are definitions for vendor responses.

- A Available** – The associated specification is resident in your solution. No measurable configuration programming or additional costs are required.
- B Minimum** – A small amount of configuration or programming (*less than 20 work-hours*) is needed to provide the related functionality. Some cost may be associated with the effort.
- C Moderate** – A moderate amount of configuration or programming (*20 to 80 work-hours*) is needed to provide the related functionality. Some cost will likely be associated with the effort. Also use this code to indicate that the function is planned for release in a future version of your product.
- D Significant** – A large amount of configuration or programming (*80 or more work hours*) is needed to provide the related functionality. This feature is not usually provided in your solutions. Significant cost will likely be associated with the effort.

- E New Code** – A completely new programming/data structure is needed to provide the related functionality. This feature is not included in any of your previous solutions. Significant cost will likely be associated with the effort.
- F Can't Provide** – Indicates an inability to provide the functionality.
- Note** For your use. Provides caveats, explanations, and other pertinent information. Use this area to quantify the number of programming hours required to implement this feature.

The County's Priority (Column "P") is to be read as follows:

**Mandatory (3):** Functions necessary for completing the basic "core" operations of the Offices of Assessment, Treasury and GIS. This includes modifications or enhancements of core functions to bring them into compliance with current procedures and standards. Without these functions, the system would operate at an unacceptable level.

Examples include: The ability to perform mass appraisal using cost, income, and market approaches, the ability to perform cancellations and supplements at any time during the year, and the ability to calculate and apply tax levies in multiple tax code areas.

**Needed (2):** Functions that expand, enhance, or support the basic "core" operations of the Offices of Assessment, Treasury and GIS, but are not currently part of the system. These functions need to be added to the system to fully achieve the benefits of a new ATS. However, in their absence, the new system could function.

Examples include: Replacing PARIS with an integrated work flow component, the ability to download field data from portable computers, and the ability to easily extract both current and historic data for analysis.

**Useful (1):** Functions that will improve the efficiency and effectiveness of the operation of the Offices of Assessment, Treasury and GIS, but that are not part of the core. In their absence, the system will continue to function.

Examples include: Accepting application fees over the Internet, and in-field wireless access to appraisal data.

- Some of the specifications may require a response redundant with a response to another area of this RFP—please respond anyway.
- A Proposer responding that "the requested information is only provided if and when the vendor is selected as the apparently successful vendor" is not acceptable.
- The titles of some specifications end with "Real/Personal." This indicates that the functional requirement applies to both the Real Property and Personal Property applications.
- Several of our functional specifications refer to Revised Codes of Washington (RCWs). We do not expect the proposer to be an immediate expert on RCWs, but we encourage you to use the following link to answer basic questions about unusual RCWs specific to Washington: <http://www1.leg.wa.gov/Legislature/InsideTheLegislature/LawsAndAgencyRules/>.

**Question Instructions:**

Please provide concise yet complete answers to each of the questions. If you choose not to respond to a question, please type “Not Applicable” and explain why you are not answering. You may compose your answers to encompass more than one question; however, if you do so, you must make it clear which questions are being addressed. You may include diagrams, examples, charts, etc., to answer the question. The ID numbers for each question are for internal Clark County use—please include them in your response.

**8.2. APPRAISAL – REAL PROPERTY****8.2.1. Requirements for all property types**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1101	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Building Permit Information	The Application shall (at a minimum) have the ability to store building permit information such as: - Date the permit was issued - Jurisdiction issuing the permit - Permit number - Permit type, and accept permitting information from the Tidemark Application.		
72	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Built Up Cost Display	The Application shall allow user to display and print, line by line, a build-up of the cost approach.		
376	2	Assessor	Appraisal Real Property - Requirements for all Property Types	Control of online field edit logic	On-line field edit logic shall be under the control of the systems administrator. The administrator shall be able to set field-level security access based on user log-in. Administrator shall also be able to set required fields without extensive programming or vendor intervention.		
130	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Copy/move characteristics	The Application shall provide the ability to copy and/or move selected property characteristics from one property to one or more properties.		
1103	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Edit Building Permit Information	The user shall be able to add, change or delete building permit information in the CAMA application. Example: When a building permit update from the Tidemark Application flags a property incorrectly, the user must be able to correct the permit information in the CAMA application.		
32	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Equity Check Tool	The Application shall provide an online search and listing of comparable properties to check for assessment uniformity and equity.		
375	1	Assessor	Appraisal Real Property - Requirements for all Property Types	Field-by-field data editing	When the focus of the Application moves from one field to another, the exited field shall immediately check for proper data format rather than waiting until the user saves the screen. For example, when the user types an alpha character into a numeric-only field, then tabs to the next field, the first field shall immediately flag the problem for correction. Alternately, when the record is saved, the cursor focus shall automatically go to the first problem field, then tab progressively through the other problem fields.		
22	3	Assessor	Appraisal Real Property - Requirements for all Property Types	IAAO Standards	The Application shall meet IAAO standards.		
150	3	Assessor	Appraisal Real	Land Valuation	The Application shall store all of the land		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Property - Requirements for all Property Types	Components for Tax Relief programs	valuation components required to administer Washington State's Senior Citizen Exemption Program and the Current Use Assessment Program. Example: The Senior Citizen Exemption applies for up to one acre of land only. Excess acres are not included in the exemption calculation and are taxed at full market value.		
148	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Linking to Multiple Digital Photographs	The Application shall support links to multiple digital photographs.		
31	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Location and Grouping Identifiers	The Application shall provide fields for the identification of appraisal areas, neighborhoods, and sub-neighborhoods.		
54	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Move To Function	The Application shall enable users to move building characteristics from one PAN to a different PAN (pictures and sketches should follow building). In the case of multiple buildings on one account, user is able to move any one or all of the buildings from one PAN to another PAN. Various value approaches applicable to each moved building follow building to new PAN (pictures and sketches should follow building). PAN = Property Account Number		
136	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Overrides for Value Calculations	When a user overrides an Application generated value, the override shall show the date, the user's name, reason for the override, assessment year applied, and a future date for override reviews.		
23	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Property Characteristic Fields	The Application shall incorporate property characteristics needed to enable the development and maintenance of sophisticated cost, market, and income models.		
30	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Property Types	The Application shall provide multiple fields to identify different property types, uses, and classifications.		
859	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Simultaneous processing of multiple years' data	The Application shall support the simultaneous processing of multiple years data, both real property data and personal property data.		
247	2	Assessor	Appraisal Real Property - Requirements for all Property Types	System defaults	The Application shall allow user-definable defaults and limits for individual fields (e.g., Maximum house size = 25,000 s.f.) at the point of data entry.		
33	3	Assessor	Appraisal Real Property - Requirements for all Property Types	System Hard Copy Output - Forms / Mailings	The Application shall enable user to produce property record cards, standard forms and form letters for sales verifications, income/ expense data collection, and current use production questionnaires.		
126	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Updates to main database and sales database	The Application shall provide the ability to update information on the main Application and sales module by entering the information only once. The user has the choice whether or not to update both simultaneously or just one.		
167	3	Assessor	Appraisal Real Property - Requirements for all Property Types	Value Exemption < \$500.00 Real property	The Application shall accommodate Washington State's value exemption of certain properties that are exempt if the assessed value is < \$500.00. See RCW 84.36.015.		
70	3	Assessor	Appraisal Real	Value Summary	The Application shall display the detail of values		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Property - Requirements for all Property Types	Display	per building component produced by the cost approach on a year-by- year basis.		

### 8.2.2. Appraisal Tables

This subject area includes any and all components leading to the assessed valuation (land and structures) that are put into tables for use in a mass appraisal application in order to maintain the uniformity of appraisals. We assume that these tables address individual components as well as lump sum adjustments. Examples include base rates, unit values, economic factors, etc.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
854	3	Assessor	Appraisal Real Property - Appraisal Tables	A - Land Tables	The Application shall use land tables to value land.		
858	3	Assessor	Appraisal Real Property - Appraisal Tables	A - Land Tables	The Application shall provide an automated approach to valuing land, utilizing rate tables that can be set up on an acreage, square foot, front foot, or site value basis by year.		
66	1	Assessor	Appraisal Real Property - Appraisal Tables	Auto Update Cost Tables	The application shall provide an automated process to update cost tables as needed.		
255	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Approach	The Application shall allow users to add new codes by updating cost schedules and data libraries without program modifications.		
254	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Approach	The Application shall store cost values for all fields and allow access through downloads. Examples: 1,000 s.f. main floor X \$80.00/s.f. = \$80,000 (stored value) 8 bath fixtures X \$400/fixture = \$ 3,200 (stored value) 2 fireplaces X \$1800/fireplace = \$ 3,600 (stored value)		
64	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Multipliers	The Application shall allow a user to apply cost multipliers and local multipliers by assessment year.		
58	2	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables	The Application shall allow users to create, store, modify, access and apply separate sets of cost tables from multiple sources for each property type. (Examples of sets of cost tables would include 1) Marshall & Swift, 2) User built table from local building costs, 3) NADA for mobile homes, 4) other nationally recognized cost table services.		
205	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables - Local Cost Modifiers	The Application shall provide a local cost modifier for each geographic area (Cycle, NH, City etc....) and for each property type.		
206	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables - Local Cost Modifiers	The Application shall allow the user to employ a current cost modifier for each building quality class.		
331	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables: Input/Output	The Applications cost tables shall allow for values per square foot, and/or linear foot and/or lump sum values by size, class, quality, style, (e.g., Avg Landscaping = Lump sum \$5,000 / Good Landscaping = Lump sum \$10,000 / Excellent Landscaping = Lump sum \$25,000)		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
330	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables: Input/Output	The Application shall allow users to enter cost data into land improvements tables (e.g., sewer lines, water lines, septic systems, tennis courts, landscaping, asphalt).		
332	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables: Input/Output	The Application shall allow users to apply costs in any combination listed below: 1. Universally across all parcels in assessment jurisdiction 2. By specified property types 3. By specified Neighborhoods 4. By specified Cycles 5. By plat 6. By individual property account number		
329	3	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables: Input/Output	The Application shall allow the user to manually change individual cost data records for all cost tables.		
334	2	Assessor	Appraisal Real Property - Appraisal Tables	Cost Tables: Input/Output - Partial print out	Some cost tables are very large and would be hundreds of pages if printed in total. The Application shall allow users to print a hardcopy of a selected portion of a table.		
341	2	Assessor	Appraisal Real Property - Appraisal Tables	Depreciation Tables	The Application shall allow users to apply depreciation tables by Marshall & Swift OCCUPANCY codes.		
340	2	Assessor	Appraisal Real Property - Appraisal Tables	Depreciation Tables	The Application shall allow users to apply depreciation tables by user-defined ranges.		
56	3	Assessor	Appraisal Real Property - Appraisal Tables	Depreciation Tables	The Application shall allow for multiple depreciation tables.		
1027	3	Assessor	Appraisal Real Property - Appraisal Tables	Depreciation Tables	The Application shall allow the user to enter an unlimited number of depreciation tables.		
49	3	Assessor	Appraisal Real Property - Appraisal Tables	History: Table Storage	The Application shall keep historical copies of all cost tables by assessment year in at least two formats: 1) Read Only 2) Active (For correcting prior years values)		
853	3	Assessor	Appraisal Real Property - Appraisal Tables	History: Table Storage	The Application shall keep a historical copy of all land value tables by assessment year in at least two formats: 1) Read Only 2) Active / Live (For correcting prior years values, segs etc....)		
63	3	Assessor	Appraisal Real Property - Appraisal Tables	Mobile Home Tables	The Application shall provide cost rate and depreciation tables for single-wide, double-wide and triple-wide mobile homes.		
388	2	Assessor	Appraisal Real Property - Appraisal Tables	Table Maintenance 1	After changes to any value related table have been made, the Application shall require the user to manually authorize its deployment to the database so that no value changes occur until approved by the user.		
153	3	Assessor	Appraisal Real Property - Appraisal Tables	Table Maintenance 2	Upon user authorization, table changes shall automatically recalculate all associated property records.		
389	2	Assessor	Appraisal Real Property - Appraisal Tables	Table Maintenance 3	The Application shall allow the user to override automatic recalculation and apply updates at specified time.		
11	3	Assessor	Appraisal Real Property - Appraisal Tables	Tables: Input/Output	The Application shall allow for batch import and export of data (using industry standard software such as .xls, .mdb or .dbf files) into or out of the CAMA Application, for all appraisal table data.		
50	2	Assessor	Appraisal Real Property - Appraisal	Unlimited Table Versions	The Application shall allow unlimited versions of all tables in the same assessment year.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Tables				
45	3	Assessor	Appraisal Real Property - Appraisal Tables	View Appraisal Tables	The Application shall enable users to view all tables on-line (on screen), or in printed form (e.g., land rate tables, land add on tables, cost tables, etc.).		

8.2.3. Commercial

Clark County has approximately 14,000 commercial, multifamily and industrial accounts. These accounts include a broad range of types, such as formerly residential properties in transition neighborhoods; multimillion-dollar electronic corporations; individual retail; regional malls; duplexes and 250-unit apartments. The appraisal group employs cost, income and sales comparison approaches to valuation.

An acceptable replacement application will include the ability to build a value from multiple segments of a property using multiple methods for each.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
523	3	Assessor	Appraisal Real Property - Commercial	Cost, Market or Income Used to value different building segments	The Application shall allow users to build a total assessed value from multiple segments of a property using multiple methods for each segment (e.g., a portion of a building may have a single purpose use valued with the cost approach and a portion of the building adaptable to many uses which would typically be valued with the income approach).		
86	3	Assessor	Appraisal Real Property - Commercial	Income Approach	The Application shall capture gross rent, vacancy and collection loss, miscellaneous income, and itemized expenses, for all property types.		
224	2	Assessor	Appraisal Real Property - Commercial	Income Approach	The Application shall calculate and display common value denominators (units of comparison) such as, Value per Unit, Value per Room, etc.		
220	2	Assessor	Appraisal Real Property - Commercial	Income Approach - Data Fields - Operating Expenses	The Application shall allow for a line-item listing of a parcel's operating expenses in the income approach record, both as a % of EGI or as a set dollar amount (as opposed to our current capability of one lump sum % adjustment) or as a dollar per s.f. value.		
91	2	Assessor	Appraisal Real Property - Commercial	Income Approach - Data Handling	The Application shall allow a user to store, view and print both an estimated and an actual income and expense statements. Actual income and expense information is confidential and must be treated accordingly.		
1104	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Data Handling	The Application shall prevent non authorized users from viewing, accessing, downloading and/or exporting confidential income and expense data.		
83	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Direct Capitalization & Gross Rent Multiplier	The Application shall allow the valuation of income-producing property using the direct capitalization and gross rent multiplier method or gross income multiplier method.		
84	2	Assessor	Appraisal Real Property - Commercial	Income Approach - Discounted Cash Flow & Mortgage Equity	The Application shall allow the valuation of commercial property using other methods such as: 1) discounted cash flow and 2) the mortgage equity method.		
92	3	Assessor	Appraisal Real Property -	Income Approach - Display	The Application shall enable the user to display and print, line by line, a build-up of the income		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Commercial		approach including land values from other parcels, personal property deductions, market indexes, and adjustment factors used. (This specification is intended to replace our current income approach screen, as shown in Appendix H, Income Sreen Sample)		
85	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Income and Expense Data Maintenance	The Application shall allow a user to update valuation components by applying a multiplicative factor to the following: rent tables, vacancy tables, expense tables and cap rate tables.		
116	2	Assessor	Appraisal Real Property - Commercial	Income Approach - Income Streams	The Application shall allow and store multiple income types for each income segment. (e.g., various rent types: Contract Rent vs. Market Rent)		
221	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Income Streams	The Application shall allow the user to enter, track, and employ multiple income streams on each parcel in the development of a value using the income approach. Examples of multiple income streams: 1) a four story building where each floor has a different rent or 2) even on the same floor suites with a view of the mountains have a higher rent than those on the opposite side with a view of the freeway or 3) multiple buildings on one property account number, where each building has a different rent level		
88	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Model Development	The Application shall provide for the development of models comprised of typical income, expense, and capitalization rate figures that can be applied to subject properties within the same strata.		
223	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Multiple Land Accounts	The Application shall allow land value from other parcels to be brought into the subject property's income stream.		
151	2	Assessor	Appraisal Real Property - Commercial	Income Approach - Multiple Uses in one Building	In all approaches to value, the Application shall allow user to designate each floor and/or building section with a specific property type code. (e.g., multi-storied commercial buildings such as the Vancouver Center or the First Interstate Tower, both mixed use developments).		
222	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Personal Property	The Application shall allow for a deduction of personal property value in all approaches to value.		
372	1	Assessor	Appraisal Real Property - Commercial	Income Approach - Rent Survey Flag	When utilizing the income approach, the Application shall notify users that the subject property had a rent survey returned.		
87	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Statistical Analysis	The Application shall provide the capability to calculate median and mean rent per unit of measure, expense ratios, market rents, vacancy levels, gross income multipliers, and overall capitalization rates for any strata of commercial property.		
82	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Summary	The Application shall display the detail of values produced by the income approach on a year-by-year basis.		
373	1	Assessor	Appraisal Real Property - Commercial	Income Approach - Survey Flag	When a rent survey has been returned on a parcel, the Application shall run a duplicate income approach display concurrently with the standard income approach display (with tabled values) so that the survey data can be utilized to value the parcel. Between the two displays, the appraiser decides which value to use.		
328	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Tables - Access to	The Application shall use data gathered and input from research to create internal tables for use in the income approach. The appraiser shall be able to request, by various parameters (i.e., property		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					type code, neighborhood, cycle), a calculated average of any table factor (dollar per square foot, average rental price per unit, average expense ratios, etc) from this table. The appraiser shall have the choice of allowing the Application-generated factor to populate the income approach fields or input a factor of their own choosing.		
327	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Tables - Autofill	Data entered from responses to the rent and expense survey/questionnaire include rental values per square foot, expense ratios, vacancy rates, etc shall be stored in a table(s). The Application shall allow users to chose at the time of entry whether or not the data is valid for use in the market tables, or solely for viewing purposes. This data shall be available for analysis and/or use in the income approach.		
90	3	Assessor	Appraisal Real Property - Commercial	Income Approach - Tables and Mass Application	The Application shall allow income and expense models to be developed, saved and applied in mass to parcels based on user defined selection criteria (E.g. Neighborhood, Cycle, Property Type, etc....)		
225	2	Assessor	Appraisal Real Property - Commercial	Income Approach - worksheets	The Application shall provide an income and expense worksheet (similar to those found in Appraisal Textbooks and the Marshall & Swift cost factor book) with the ability to link the worksheet to the appropriate benchmark account.		
525	3	Assessor	Appraisal Real Property - Commercial	Income Approach-GRM	When valuing a Multi-Family property using a GRM, the Application shall allow a line item adjustment for personal property.		
448	3	Assessor	Appraisal Real Property - Commercial	Income Approach- Income Stream	The Application shall allow users to identify and associate (allocated) an income stream to a specific building section and/or building floor as needed.		
528	2	Assessor	Appraisal Real Property - Commercial	Income Approach- MF-GIM	The Application shall enable users to value multi-family properties (e.g.: duplex, triplex+>, apartment complexes) using a GIM (Gross Income Multiplier).		
502	3	Assessor	Appraisal Real Property - Commercial	Income Approach- MF-GRM	The Application shall be able to value multi-family properties (e.g.: duplex, triplex+>, apartment complexes) using a GRM (Gross Rent Multiplier).		
530	3	Assessor	Appraisal Real Property - Commercial	Income Approach- MF-GRMs	The Application shall allow multiple GRMs (or GIMs) on one parcel.		
529	3	Assessor	Appraisal Real Property - Commercial	Income Approach- MF-Misc.Rents	Multi-family property owners often charge a separate rent for parking spaces, carports and/or garages. The Application shall be able to track these rents separately from the base unit rents. (If not available, explain in notes.)		
524	3	Assessor	Appraisal Real Property - Commercial	Income Approach- Personal Property	The Application's income approach shall allow for the addition of personal property value (e.g., Company Reports would show land, building and M&E values).		

8.2.4. Data Characteristics

In Clark County, all physical attributes, amenities, and conditions affecting value need to be recorded on the Property Account Number.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
856	3	Assessor	Appraisal Real Property - Data Characteristics	Building Condition	The Application shall allow multiple building condition descriptions (E.g. Fair, Good, Average		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					etc....)		
207	2	Assessor	Appraisal Real Property - Data Characteristics	Building Quality Classes - All Properties	The Application shall allow for at least 24 base building quality classes for each property type.		
326	1	Assessor	Appraisal Real Property - Data Characteristics	Building Quality Classes - Other Structures	The Application shall allow multiple quality classes (expandable as needed) for all structures and other improvements. By all structures we mean SFR's, commercial, industrial, condos, multi-family, outbuildings, tennis courts, pools, detached garages, accessory dwelling units etc.		
855	3	Assessor	Appraisal Real Property - Data Characteristics	Building Style	The Application shall allow multiple building styles. (E.g. ranch, 2-story, split level, bi-level, log cabin, etc....) (Explain any limitations to the number of allowed styles.)		
53	3	Assessor	Appraisal Real Property - Data Characteristics	Data Exchange Between Property Types	The Application shall provide the capability to transfer records between property types, such as residential and commercial, for change of use, valuation and/or characteristics.		
35	1	Assessor	Appraisal Real Property - Data Characteristics	Information Source ID Codes	The Application shall enable the user to tag property characteristics with identifiers as to the source of the information, such as Clark County user ID, taxpayer, fee appraiser, realtor, home inspector etc.		
39	3	Assessor	Appraisal Real Property - Data Characteristics	Land Characteristics	The Application shall separate the land component of a single parcel into specific land categories (home site, low, wet, rolling, flat etc.) by standard units of measurement (Sq. Ft., acres, lineal feet) each with its own value component.		
337	3	Assessor	Appraisal Real Property - Data Characteristics	Land Characteristics	On each land record, the Application shall allow for a location identifier (N, NW, NE, S, SW, etc.) per land sub-category.		
336	3	Assessor	Appraisal Real Property - Data Characteristics	Land Characteristics	On each land record, the Application shall allow sub-category identifiers, such as corner, pad site, prime land, contaminated etc... Identifiers can then be linked to a value table, coefficient, or percentage adjustment.		
37	3	Assessor	Appraisal Real Property - Data Characteristics	Land Characteristics	The Application shall accommodate different units of measure for land value, including, square foot, front foot, acre, and number of homesites and shall have separate fields for each unit of measurement.		
992	3	Assessor	Appraisal Real Property - Data Characteristics	Land Classification - Improved and Unimproved	The Application shall allow the user to code each line item of land as either improved or unimproved.		
338	3	Assessor	Appraisal Real Property - Data Characteristics	Land Dimensions	The Application shall allow the user to enter actual dimensions of a parcel (e.g., 50' x 100').		
57	3	Assessor	Appraisal Real Property - Data Characteristics	Multiple Floor SFR's / Condos	The Application shall allow separate data entry for each floor of a building.		
512	3	Assessor	Appraisal Real Property - Data Characteristics	Residential - Multiple Stories	The Application shall allow for 4 or more above ground stories on a single-family residential structure. If not available, please explain how a multiple story structure is entered in your Application.		

8.2.5. Photos and Sketches

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
487	2	Assessor	Appraisal Real Property -	Building square	The CAMA Application's building square footage shall automatically reflect the building square		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Photos and Sketches	footage	footage from the building sketch.		
181	3	Assessor	Appraisal Real Property - Photos and Sketches	Data Entry Without a Sketch	The user shall be able to value all structures regardless of whether or not a sketch is associated to the property.		
176	1	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Copy	The user shall have the ability to copy a sketch from one parcel to one or more parcels.		
178	2	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Edit	The user shall have the ability to edit a sketch without the need to re-enter data. For example: We would like to add an addition to an existing sketch, without the need to redraw the original sketch.		
175	2	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Entering a Sketch	The Application shall allow the user to control the size and locations of dimensions, labels, annotations, and notes.		
534	3	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Entering a Sketch	The user shall be able to shade specific building areas, specify line widths, shading colors, etc.		
537	1	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Entering a Sketch	The user shall be able to use patterns such as diagonal lines, dots, etc. covering a selected area of the building.		
538	3	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Entering a Sketch	The user shall be able to easily sketch irregular shapes (rounded surfaces, angles) for improvements and all structures, including pools.		
539	3	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Entering a Sketch	The user shall be able to place annotations in various sections of the sketch showing year built.		
174	2	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Multiple buildings	The Application shall support multiple building sections and structures per property with full sketch and/or identification as to approximate location on property.		
179	1	Assessor	Appraisal Real Property - Photos and Sketches	Sketch - Zoom	The user shall have the ability to zoom in and out during sketching, editing and viewing.		
177	3	Assessor	Appraisal Real Property - Photos and Sketches	Sketch Viewing	The Application shall allow for user-identified on-line viewing without access to update capabilities. (Security access profile for read-only users)		

### 8.2.6. Physical Inspections and Data Collection

Our appraisers need to arrive on site with all tools necessary to accurately document all characteristics contributing to the value of a parcel. This would include, but is not limited to, parcel data from the CAMA system, photographs, sketches and maps.

A strategic goal for the Assessor office is to have seamless integration between the CAMA system and portable field devices in such a way that data transfers are direct and no intermediary conversion process or third parties are needed to move field data off a field device into the CAMA system.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
10	3	Assessor	Appraisal Real Property - Physical	E-Building Cards (AKA Field Sheets) - Digital	Application shall enable user to export or download specified property characteristics and digital images to a field device (PDA, Laptop PC,		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Inspections and Data Collection	Copy - Field Device Compliant	Tablet Computer). Application shall enable the appraiser to select parcel characteristics, digital images, and sketches by any user defined criteria including at the minimum by: 1. Cycle Number (With careful controls in place - this will generate 1,000's of records) 2. Neighborhood Number 3. Parcel Number		
9	3	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	E-Building Cards (AKA Field Sheets) - Hard Copy - Print Run	The Application shall allow the appraiser to: a: Query the parcel database by user identified criteria, to identify parcels to include in a revaluation area b: Gives user option to set nested sort order of query output (e.g. By NH, by Geocode, by PAN) c: The Application shall prompt the user with selection criteria and sort order and identifies # of parcels in print run; then allows user to cancel or proceed with print run to generate hard copies of field sheets.		
36	1	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Land & Building Characteristics	The Application shall allow the user to indicate when property characteristics are estimated.		
158	3	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Neighborhood Groupings	The Application shall allow user to create neighborhoods of properties by user defined parameters, such as: property account number, geocode ranges, property type codes, building class, building style, etc.... And save data to a file for future analysis.		
123	1	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Portable Computing Device - transmission of data	The Application shall accommodate cellular, radio, or microwave transmission of data from field to host.		
117	3	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Portable Computing Devices -	The Application shall have upload and download capability between the Application and a portable computing device.		
121	3	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Portable Computing Devices - data copy	The Application shall enable users to copy inspection data and characteristics from one property account number to another for speedy collection. (Useful in a subdivision with "same as" buildings).		
183	2	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Portable Computing Devices - Field Module	The Application shall have a module for use on a portable computing device that will facilitate field activities including data collection, data correction, valuation, measuring - sketching, GPS guidance, digital map displays, and workflow management tools for efficient inspection routing. If you answer yes, please explain which of the above activities your Application does and any limitations.		
122	3	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Portable Computing Devices - sketching	The Application shall provide full sketch drawing data entry and editing on a portable field device.		
877	2	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Portable Computing Devices - transmission of data	A strategic goal for the Assessor office is to have seamless integration between the CAMA Application and portable field devices. The Application shall allow direct data transfers without requiring an intermediary conversion process or third parties in order to move field data off a field device into the CAMA Application or		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					vice versa.		
8	1	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Query: Product: Rent and Sales Surveys - Output	Application shall allow appraiser to generate rent and sales surveys by any one or more of the following criteria / sorts: 1. Neighborhood Number 2. Cycle Number 3. Primary Property Type (AKA PT1) 4. Secondary Property Type (AKA PT2) 5. Sale Price Range (e.g., Sales >\$10,000; or Sales between 10,000 and \$1,000,000) 6. Sale Date Range 7. Excise Number In the case of an IOP Sale (IOP = Includes Other Parcels), the Application shall combine property characteristics into one survey.		
7	3	Assessor	Appraisal Real Property - Physical Inspections and Data Collection	Report: Identify Parcels	Application shall allow user to query property account database by any user defined criteria (e.g. NH, Cycle, plat, etc...) or combination of criteria with output exportable to industry standard programs (e.g. MS Excel, MS Access, SPSS)		

8.2.7. State-assessed Utilities

The new system shall accommodate the assessment of state assessed utility accounts for real property according to RCW 84.12.all. The accounts, their respective assessed values and tax code areas must be tracked, as the information is needed for the levy calculation/certification process.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
397	3	Assessor	Appraisal Real Property - State-assessed Utilities	State Assessed Utilities - Real property	The Application shall allow the user to enter state-assessed utilities for real property and process them through the assessment roll, levy calculation & certification, tax roll and tax collection as required by Washington State Law RCW 84.12.all.		

8.2.8. Valuation

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
71	3	Assessor	Appraisal Real Property - Valuation	Adjustment Indexes: Functional, Economic, Market	The Application shall enable user to apply multiple adjustments for the physical, functional, and economic obsolescence; location and market influence adjustments for factors that affect property values. Additionally, each adjustment can be identified with a explanation code. Each adjustment can be associated with a sunset date. (E.g. 10 yr tax break on CBD housing)		
379	3	Assessor	Appraisal Real Property - Valuation	Administrative Segregation	The Application shall provide a method to display all related parcels (in the administrative segregation) together with a summary of key property information.		
226	3	Assessor	Appraisal Real Property - Valuation	Administrative Segregation	The Application shall allow for the segregation of a parcel or a portion of a parcel (land or building) not based on a legal description or transfer but based on an administrative reason. Examples include a portion of a taxable office building used by a non taxable tenant, we would seg out the Sq.Ft. of the tax exempt portion of the building. Another example would be Officer's Row were we have one (1) parcel and twenty-two (22) buildings with each building segregated out to a building-only account for tracking purposes.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
230	3	Assessor	Appraisal Real Property - Valuation	Annual Adjustment - "Do Not Adjust" Flags	The Application shall allow coding of individual properties with a flag or marker that prevents the annual adjustment from being applied. (e.g., MF rent restricted properties, Contaminated properties, Unique Properties).		
172	3	Assessor	Appraisal Real Property - Valuation	Annual Assessment	The Application shall identify different value components (e.g. market value, assessed value, land use value) and annually adjust each component separately.		
410	3	Assessor	Appraisal Real Property - Valuation	Annual Assessment	The user shall have the ability to apply percentage adjustments to either land value, building value or both. These adjustments shall be able to be applied to groups of parcels based on user defined criteria including but not limited to: Property Account Number, Building Style, Building Class, , Occupancy Code, Effective Age, Actual Age, GLA, Property Type, Zoning, Site Size, Neighborhood Code, Cycle Code, or County-wide).		
258	2	Assessor	Appraisal Real Property - Valuation	Annual Assessment	The Application shall be able to analyze sales ratio statistics by user defined selection criteria. This module provides the necessary information to make comparisons between classes and locations and identify categories with differences in value level or variance. These categories can then be checked to determine if adjustments are required.		
380	2	Assessor	Appraisal Real Property - Valuation	Annual Assessment	Stores all percent adjustment changes by assessment year in a sortable program or exportable to a sortable program.		
47	3	Assessor	Appraisal Real Property - Valuation	Annual Assessment	The Application shall allow land and building values to be updated by applying percentage adjustments.		
67	3	Assessor	Appraisal Real Property - Valuation	Annual Assessment	The Application shall provide a trending technique for determining the value of real property using acquisition cost/sale price with time adjustments backwards and forwards for inflation or deflation rates.		
29	1	Assessor	Appraisal Real Property - Valuation	Automated Value Approach Override	The Application shall have a "default" valuation approach with an appraiser override feature where the user can select an alternate valuation approach in the reconciliation process.		
210	3	Assessor	Appraisal Real Property - Valuation	Benchmark Properties	The Application allows users to establish benchmark properties.		
202	3	Assessor	Appraisal Real Property - Valuation	Building Value Adjustments / Add ons - Building Miscellaneous Table	Building Add On Module: Treat each statement below as a separate question as it relates to an Add On Module The Application shall allow dollar adjustments (add to or subtract from base value) for specific building characteristics and/or influences to building value (LP Siding Adjustment, development fees [vary by jurisdiction], permitting costs, park & school impact fees, view [for condos downtown with no land value or on 99 yr leased land], locational factors not accounted for in the land model etc.) The Application's Building Add On records shall be unlimited and can be grouped by multiple identifiers (e.g. neighborhood, cycle, plat, city, County, property type) Can be batch uploaded and applied. Can be manually entered on individual basis. Allows percentage adjustments to each Add On field (AA) by user defined criteria (e.g. NH#, Cycle, Prop Type etc). As an alternate to a set dollar amount, allows same Add-On record to be a		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					percent of the base building value prior to calculating Add-Ons. In this scenario, an AA adjustment to the building automatically adjusts the Add-On value.		
154	3	Assessor	Appraisal Real Property - Valuation	Characteristics For Mobile Homes	The Application shall have the ability to store multiple attributes on mobile homes including: Make and model, length and width, serial number as shown on the vehicle title registration, etc.		
79	2	Assessor	Appraisal Real Property - Valuation	Comparable Sale Approach	Comparable sales approach has the ability to individually or universally adjust selection weights and characteristic adjustments. Supports separate property selection weights and property characteristic value adjustments (dollars and percentage).		
864	2	Assessor	Appraisal Real Property - Valuation	Comparable Sales	Within the sales approach model, the Application shall allow for the selection of comparable sales within a user defined radius. (E.g. .25 mile from subject, 1 mile, 3 miles etc.....)		
73	2	Assessor	Appraisal Real Property - Valuation	Comparable Sales Algorithm	The Application shall allow for the selection of comparable sales based on a statistical algorithm utilizing a set of user-defined criteria and weights.		
78	2	Assessor	Appraisal Real Property - Valuation	Comparable Sales Grid - Display / Output	Comparable sales approach displays individual property characteristics for subject and comparable property, and auto-calculates individual and gross comparable property adjustments. The Application shall allow export of comparable sales grid in report format (paper and digital)		
80	3	Assessor	Appraisal Real Property - Valuation	Comparable Sales Selection Override	The Application shall allow users to override the Application-selected comparables and/or individual characteristic adjustments. The Application shall recalculate values based on the new comparables and/or adjustment rates.		
342	2	Assessor	Appraisal Real Property - Valuation	Comparable Sales Selection Override	The Application shall utilize a user-defined comparable selection criteria to search for comparable sales which results in an Application-recommended value.		
203	3	Assessor	Appraisal Real Property - Valuation	Condition Modifier Tables	The Application shall allow a percentage adjustment (positive or negative) against the DRCN for condition factors (e.g. worn out, fair, avg., good, very good, excellent, etc.)		
504	3	Assessor	Appraisal Real Property - Valuation	Condominiums	The Application's method of valuing condominiums shall incorporate the same functionality and methodology available for single family residential structures.		
44	3	Assessor	Appraisal Real Property - Valuation	Contiguous Land Valuation	The Application shall provide an effective means of identifying and valuing contiguous land with the same owner (regarding valuation: at the minimum by acres and by sq. ft. tables) that allows valuation as one larger parcel.		
60	3	Assessor	Appraisal Real Property - Valuation	Cost Approach	The Application shall support replacement cost new (RCN) calculations based on the comparative unit and unit-in-place methods. The comparative unit method provides for the automated addition of items not included in the base rates and the deletion of items that are included in the base rates.		
59	3	Assessor	Appraisal Real Property - Valuation	Cost Approach: RCN and RCNLD	The Application shall calculate a replacement cost new (RCN) and replacement cost new less depreciation (RCNLD).		
62	3	Assessor	Appraisal Real Property - Valuation	Depreciation Override	The Application shall enable users to apply different depreciation amounts to different buildings on the same property and allow user		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					override.		
449	3	Assessor	Appraisal Real Property - Valuation	Dollar Adjustment	After calculating RCNLD, the Application shall allow users to add a positive or negative lump sum dollar adjustment to adjust the building value.		
81	3	Assessor	Appraisal Real Property - Valuation	Final Value Reconciliation	The Application shall support a value reconciliation process within the comparable sales approach and between other valuation approaches to derive final reconciled assessed value estimate.		
28	3	Assessor	Appraisal Real Property - Valuation	Global Update / Upload	The Application provides global update and upload capabilities for groups of records that include common characteristics. The Application shall also enable user to finalize the values of selected groups of records.		
38	3	Assessor	Appraisal Real Property - Valuation	Land Valuation	The Application shall Incorporate the development of land valuation models by all tracked land characteristic fields including but not limited to zoning, property type, location, and unit of comparison.		
61	3	Assessor	Appraisal Real Property - Valuation	Land Valuation	The Application shall provide an automated approach to valuing land utilizing rate tables that can be set up on an acreage, square foot, front foot or site value basis either for a batch process for multiple accounts or for a single parcel.		
149	3	Assessor	Appraisal Real Property - Valuation	Land Valuation - Special Assessments	The Application shall allow for the calculation of land values based on Current Use legislation.		
260	3	Assessor	Appraisal Real Property - Valuation	Land Value	The Application shall track land by topography categories (low, flat, steep, wet etc.) with the ability to apply an adjustment factor specific to each topography category per parcel.		
40	3	Assessor	Appraisal Real Property - Valuation	Land Value Adjustments - Batch Adjustments (AA)	The Application shall allow percentage adjustments to base land value tables to reflect influences that may not be typical in the neighborhood (development issues, access)		
42	3	Assessor	Appraisal Real Property - Valuation	Land Value Adjustments - Individual	The Application shall allow percentage adjustments to land values on parcel-by-parcel, line-by-line basis to reflect influences that may not be typical in the neighborhood (development issues, access).		
41	3	Assessor	Appraisal Real Property - Valuation	Land Value Adjustments / Add ons - Land Miscellaneous Table	Apart from Base Land Value Tables, the Application shall have a separate way of tracking and adding incremental land value attributable to miscellaneous factors, such as well, septic, view, easements, traffic, and noise influences.		
256	3	Assessor	Appraisal Real Property - Valuation	Market Approach	The Application shall produce market value estimates using comparable sales.		
1015	2	Assessor	Appraisal Real Property - Valuation	Market Approach	The Application shall include the ability to extract sold properties from the master sales file and build a sales history file on the subject property for sales analysis purposes.		
173	3	Assessor	Appraisal Real Property - Valuation	Miscellaneous Real Property Assessments	The Application shall provide the ability to assess boathouses, houseboats, mobile homes, airplane hangers, decks, carports, leased buildings, etc. under their own property account numbers, independent from the land on which these improvements might be located.		
26	3	Assessor	Appraisal Real Property - Valuation	Multiple Building Value Calculation & Tracking	The Application shall display all records associated with any parcel (e.g., mobile homes and land parcels, parcels with two homes, contiguously assessed parcels) and calculate the overall value of all records while maintaining and displaying		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					separate values.		
263	3	Assessor	Appraisal Real Property - Valuation	Multiple valuation approaches	The Application shall allow users to select either the cost approach, direct comparable sales approach, the income approach or a combination of the three approaches to value for each property.		
69	3	Assessor	Appraisal Real Property - Valuation	New Construction - % complete field	In all approaches to value, for each building or structure on a parcel, the Application shall have a separate percent complete field that automatically adjusts the building or structure value relative to the building or structure's overall percent complete.		
252	3	Assessor	Appraisal Real Property - Valuation	Obsolescence calculations in each Appraisal Method	In each value approach, the Application shall have field(s) to capture and apply appraiser's calculation of: 1) Functional Obsolescence 2) Economic Obsolescence 3) Physical Obsolescence		
65	3	Assessor	Appraisal Real Property - Valuation	Percentage Modifiers for Cost Tables	The Application shall provide for the use of percentage modifiers to calibrate RCN to the local market.		
169	3	Assessor	Appraisal Real Property - Valuation	Quality Control - AA Check Reports	After Application of Application-wide adjustments, the Application shall allow user to request electronic, sortable check reports showing before and after market values (as opposed to Frozen Sr. Values) and other such criteria as determined necessary.		
27	3	Assessor	Appraisal Real Property - Valuation	Recalculate Values based on new data	The Application shall recalculate values for current or prior assessment years based on changed characteristics.		
75	3	Assessor	Appraisal Real Property - Valuation	Regression Analysis	The Application shall allow comparable sale prices to be adjusted based on coefficients produced by the regression analysis.		
77	3	Assessor	Appraisal Real Property - Valuation	Sale Comparison Models	Sales comparison models are applicable to agricultural, residential, condominiums, commercial, industrial, multi-family, mobile homes, and personal property class of property.		
107	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis	The Application shall enable users to compute standard IAAO statistics such as sales ratios, minimum, maximum, variance, mean, median, standard deviation, coefficient of variation, average absolute deviation, coefficient of dispersion and price-related differential (PRD).		
106	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis	The modeling process allows variables to be expanded, combined, and transformed as needed for use in the regression analysis.		
103	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis	The Application shall allow data transformations and statistical model analysis from SPSS or similar statistical analysis modeling applications.		
104	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis	The Application shall be able to integrate various SPSS (or similar) statistical modeling applications and transformations of variables.		
111	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis - Calibration Tools	The Application shall provide tools to assist in the calibration of cost and depreciation tables and neighborhood land and building adjustments.		
113	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis - Data Transfer	The Application shall enable the user to quickly read and write data between the assessment application and SPSS (or similar) software.		
114	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis - Model Applicability	The Application shall enable the user to develop and apply statistical valuation models to subject records of the same type, same location and with the same units of comparison.		
109	2	Assessor	Appraisal Real Property -	Statistical Analysis - Ratio	The Application shall allow the user to incorporate time adjustments into sales and ratio studies.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Valuation	Reports			
108	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis - Ratio reports	The Application shall generate a standard ratio report by user specified criteria. (User specified criteria such as: sale date range, sales ratio range, verification codes, type of property, neighborhood codes, cycle codes, school districts, and/or taxing districts codes. )		
347	3	Assessor	Appraisal Real Property - Valuation	Statistical Analysis - Ratio reports	The Application's ratio reporting capabilities shall comply with the requirements outlined in WAC 458-53-100all.		
112	2	Assessor	Appraisal Real Property - Valuation	Statistical Analysis - Time Studies	The Application shall provide time series analysis capabilities to measure inflation and deflation.		
24	3	Assessor	Appraisal Real Property - Valuation	Value Methods	The Application shall allow market values to be determined based on cost, market, and income models that can be stored.		
76	3	Assessor	Appraisal Real Property - Valuation	Value Model Formats	Supports additive, multiplicative, and hybrid value model formats.		
43	3	Assessor	Appraisal Real Property - Valuation	Value Override	The Application shall enable a user to override a value generated by the Application with a value that is entered directly in the record.		
74	2	Assessor	Appraisal Real Property - Valuation	Value Summary Display	The Application shall display the details of assessed values produced by the sales comparison approach on a year-by-year basis.		
48	3	Assessor	Appraisal Real Property - Valuation	View Adjustments	The Application shall allow for view quality and market adjustment factors to be applied to view properties.		

8.2.9. Value Notifications

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
394	3	Assessor	Appraisal Real Property - Value Notifications	Data on value notifications	Value notifications shall show the following data: - Name and mailing address - Situs address - Abbreviated legal description - Tax code area - Prior year's and new year's values for all value categories, with breakdown between land and building (e.g., market values, current use values and senior exemption values, when applicable) - A total value that will be the basis for the following year's taxes.		
396	3	Assessor	Appraisal Real Property - Value Notifications	Generating value notifications	The user shall be able to generate and print value notifications in-house and through an outside vendor.		
395	3	Assessor	Appraisal Real Property - Value Notifications	Information on value notifications	The Application shall allow the user to create custom valuation notices without vendor / programmer assistance.		
867	2	Assessor	Appraisal Real Property - Value Notifications	Send more than one value notification	The Application shall allow users to create value notification letters in batch, by specific property account numbers or other user defined criteria.		
1028	3	Assessor	Appraisal Real Property - Value Notifications	Separate Mailings	The Application shall allow printing and mailing of valuation notices of selected groups of properties or individual property accounts as many times as needed during an assessment year.		
324	3	Assessor	Appraisal Real Property - Value Notifications	Valuation Notice - Do Not Mail	The Application shall provide automatic coding or flagging of parcels based on user-defined criteria that prevents a valuation notice from printing. For example: the user specifies all non-contiguous parcels with less than \$500 of assessed value do		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					not have valuation notices printed. The Application responds by identifying qualified parcels and automatically coding them with a do not print code.		
145	1	Assessor	Appraisal Real Property - Value Notifications	Value Notifications and Special Exemptions	The value notification shall display the type of special exemption that applies to the property (Example: Historic Property, Multifamily Tax Abatement, 30% Homeowner's Exemption, etc.)		
860	3	Assessor	Appraisal Real Property - Value Notifications	View image of value notification	The Application shall display and store an image of the value notification letter.		

**8.2.10. What-if Calculations**

This functionality allows the user to see what will happen, or what would have happened, to a particular parcel or a grouping of parcels should a change be made within the CAMA system without actually updating the subject(s).

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
133	3	Assessor	Appraisal Real Property - What If Calculations	Current year what if valuation calculations	Prior to posting the property's final value, the user shall be able to calculate and view the current year's values based on varying valuation scenarios.		
132	3	Assessor	Appraisal Real Property - What If Calculations	Prior years value calculations	The Application shall provide the ability to recalculate values for (at a minimum three) prior years based on changed property characteristics.		
110	3	Assessor	Appraisal Real Property - What If Calculations	Statistical Analysis - What If	The Application shall incorporate an Application-wide "What-if" module that allows the user to test the impact to values and sales ratios when changes are made to cost tables and parcel characteristics.		
861	3	Assessor	Appraisal Real Property - What If Calculations	Statistical Analysis - What If	The Application shall allow "What-if" analysis on individual property account numbers.		

**8.3. APPRAISAL – PERSONAL PROPERTY**

Personal property consists of all property that is not real property. It is property that is movable without damage to itself or the real estate; that is, it can be re-located. Personal property is either tangible or intangible. Tangible personal property is property that has a substantial physical presence beyond merely representational. It is assessable. In the state of Washington, intangible personal property is not assessable, e.g., goodwill, patents etc. Washington state law requires the discovery, listing and valuing of all taxable personal property within each County each year.

**8.3.1. Requirements for All Accounts**

Personal property appraisal determines through self-reporting or agency estimates the monetary value of qualifying property. Detailed asset listings are mailed to existing and newly discovered accounts. Asset listings are returned to the County and valued using depreciation schedules, industry standards, and professional judgment. Asset details are retained and used for the asset listings mailed the following year.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
312	1	Assessor	Appraisal Personal Property - Requirements for all accounts	Account analysis and comparison	The user shall be able to perform comparisons on similar businesses in order to analyze amounts reported and variances.		
852	3	Treasurer	Appraisal Personal Property - Requirements for all accounts	Advance Taxes	The Application shall create advance tax notification for an account. This information shall include account number, current owner, address, code area, tax years affected, levy rates detailed for each of these years, tax amount owing, due date, and an explanation as to the reason for advance tax bill.		
872	3	Treasurer	Appraisal Personal Property - Requirements for all accounts	Advance Taxes	The Application shall provide reporting as to collection activity associated with advance tax bills. This reporting shall be scheduled, yet also be able to run on-demand.		
873	3	Treasurer	Appraisal Personal Property - Requirements for all accounts	Advance Taxes	The Application shall document, within the audit trail, that an advance tax notice (statement) has been generated.		
286	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Batch updates from data files	The user shall be able to perform batch updates from data files. Example: Tax code areas, situs address, etc.		
285	2	Assessor	Appraisal Personal Property - Requirements for all accounts	Cross-check tax code area	The Application shall provide the ability to cross check the tax code area assigned to a personal property account if the account is linked to a real property account number.		
374	2	Assessor	Appraisal Personal Property - Requirements for all accounts	Electronic filing and value notifications	The Application shall support filing and sending value notifications electronically.		
246	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Link between Personal Property and Real Property	The Application shall maintain a relationship between personal property and the associated real property.		
306	2	Assessor	Appraisal Personal Property - Requirements for all accounts	Linking scanned documents or data files	The user shall be able to link scanned documents or data files to a personal property account. (Also see specification #271.)		
308	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Miscellaneous Fields	The user shall be able to enter information for the following areas: - Business Open Date - Business Close Date - Business Sale Date		
302	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Personal Property Account Numbers	The Application shall automatically assign a property account number to a new account. The account numbers have a different format or key identifier for each of the personal property categories (commercial, farm and state assessed utilities).		
259	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Personal Property Account Status	The user shall be able to track the status of an account (e.g., Notice sent? Form returned by owner? Returned timely? Account valued? Valuation notice sent?)		
543	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Personal Property/Addresses	The mailing address shall consist of two address lines, and the length of fields shall be large enough to accommodate up to 50 characters.		
544	3	Both	Appraisal Personal	Personal	The Application shall have the ability to change		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
		Assessor and Treasurer	Property - Requirements for all accounts	Property/Addresses	both the mailing address and the situs with a single entry.		
545	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Personal Property/Addresses	The Application shall automatically update the personal property account and the real property account when the situs address is changed.		
546	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Personal Property/Addresses	When the change of address is electronically entered, the Application shall automatically change all forms (scanned images).		
547	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Personal Property/Addresses	The Application shall send address changes, both mailing and situs, to a history file.		
548	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	Personal Property/Addresses	The Application shall automatically update address changes in integrated or third-party collection software.		
311	2	Assessor	Appraisal Personal Property - Requirements for all accounts	Query - New personal property discovery accounts	The user shall be able to run a query against all new personal property discovery accounts, showing items such as: Year account was discovered, individual account value, total number of accounts discovered, total value added to the assessment roll, timely filed, late filing penalty, no file, etc.		
294	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Request for listing of personal property - Commercial except for leasing companies	After the batch valuation update has been performed the user is able to generate Request for Personal Property Listings on all active commercial accounts (except for leasing companies). The Application tracks the date that this notice was generated as well as the date that the notice was mailed. These fields are automatically updated. For a sample, please refer to Appendix G - Report Samples.		
293	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Request for personal property listing - Farm	After the batch valuation update has been performed the user shall be able to generate Request for Personal Property Listings on all active farm accounts. For farm accounts that qualified in the previous year for the Farm Exemption, only the master account is generated. This master account should display the combined, prior year's information of the master and sub-account's asset detail lines. The Application shall track the date that the notice was generated as well as the date that the notice was mailed. These fields shall be automatically updated. For a sample, please refer to Appendix G - Report Samples.		
295	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Request for personal property listings - Leasing companies	After the batch valuation update has been performed, the user is able to generate Request for Personal Property Listings on all active commercial lease master accounts. These accounts do not display the precalculated asset detail lines and summarized subtotals and totals. The Application tracks the date that this notice was generated as well as the date that the notice was mailed. These fields are automatically updated. For a sample, please refer to Appendix G - Report Samples.		
291	3	Assessor	Appraisal Personal Property - Requirements	Request to list personal property - All account types	After all accounts have been updated using the new year's valuation tables and information has been copied forward from the prior year, the user shall be able to generate notifications asking		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			for all accounts		property owners to update their personal property listings. The Application shall provide the ability to generate these notifications by a third-party vendor or in-house.		
296	2	Assessor	Appraisal Personal Property - Requirements for all accounts	SIC (Standard Industrial Classification) or NAICS (North American Industry Classification System)	The Application shall store SIC or NAICS codes and associate them to personal property accounts. Note: We do not know which of the two codes will be in use when we implement the new Application.		
299	2	Assessor	Appraisal Personal Property - Requirements for all accounts	SIC (Standard Industrial Code) field	The Application shall have a field to assign a SIC and its corresponding explanation to each account. The user shall be able to define which screens, forms, etc. the SIC code and explanation should be included in.		
318	1	Assessor	Appraisal Personal Property - Requirements for all accounts	Tax Registration Number	Able to store a tax registration number.		
321	3	Assessor	Appraisal Personal Property - Requirements for all accounts	Track number and values of farm accounts that do and do not qualify for the Farm Exemption	The Application shall track the number and value of all farm accounts that qualify for the Farm Exemption and those that do not. This information is required for the Abstract Report that is completed yearly for the Washington State Department of Revenue.		
300	2	Assessor	Appraisal Personal Property - Requirements for all accounts	UBI (Unified Business Identifier) number field	Has a field to store the UBI number for each commercial account. The user is able to define which screens, forms, etc. the UBI number should be included in.		
307	3	Assessor	Appraisal Personal Property - Requirements for all accounts	User defined notes and account history	User shall be able to view an account's history/notes. These notes, at a minimum, shall include: - By year if an account was not timely filed and received a filing penalty - If an account was audited - Business open date - Business close date - Business sale date - Notes entered by the user from audits, revaluation, contact with the property owner, etc. These notes are categorized (drop-down menu?)		
248	3	Both Assessor and Treasurer	Appraisal Personal Property - Requirements for all accounts	View and Print Reports	The Application shall allow the user to view and print reports on all personal property accounts at a common, user defined location. For example, all businesses in a single building, or stores at a strip mall.		

8.3.2. Audit

Personal property auditing is the process of identifying non-payers, non-filers, and performing a paper audit or site visit.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
305	2	Assessor	Appraisal Personal Property - Audit	Audit fields and tracking	The Application shall contain the following fields to allow the user to track audit processes: - Scheduled audit date/year (i.e., date when the audit should occur) - Date that the audit letter was mailed - Date that the audit was conducted - Type of audit that was done (field, office, etc.) - Date that the audit was completed - How the audit was solicited, if at random, the Application shall show that, if selected individually the Application should allow the user to enter a note stating why		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					the account was selected for the audit (drop down menu?).		
304	2	Assessor	Appraisal Personal Property - Audit	Audit Selection	The user shall be able to mark an account to be audited in the future, or select accounts to be audited at random with a user-defined selection criteria.		

### 8.3.3. Farm Exemption

Under RCW 84.36.630, certain qualifying farm machinery and equipment owned by a farmer may be exempt from the state portion of the personal property tax. Each year, the property owner must complete an application and file it with the Personal Property Farm Listing in order to qualify for this exemption.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
282	3	Assessor	Appraisal Personal Property - Farm Exemption	Farm Equipment Exemption RCW 84.36.630	The Application shall be able to administer Washington State's Farm Equipment Exemption according to RCW 84.36.630. This law exempts property owners of certain farm equipment from paying the state portion of the levy rate. Example: A farmer may own some equipment that is taxed at the full levy rate, and other equipment that is exempted from the state portion of the levy rate. If the Application administers this exemption by establishing two accounts for the same property owner (master and sub-account), then the two accounts will need to be linked for viewing and reporting purposes.		

### 8.3.4. State-assessed Utilities

The state of Washington is responsible for valuing personal property associated with companies that provide utility services and have tangible assets that encompass more than one County. These values are reported by the state to the County assessor, processed through the County's assessment roll, and used in levy certification, tax roll, and tax collection procedures.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
392	2	Assessor	Appraisal Personal Property - State-assessed Utilities	Automated preparation for state assessed utilities - Personal Property	The Application shall provide an automated mechanism that allows the user with minimal manual data entry to calculate the appropriate railroad mileage percentages, assign account numbers by property owner and tax code areas, verify total assessed values by property owner and tax code area, and update the Application.		
393	2	Assessor	Appraisal Personal Property - State-assessed Utilities	Compare prior year's values to current year's values for state assessed utilities - Real/Personal	The user shall be able to compare the prior year's total assessed value of state-assessed utilities (real and personal property) by tax code area and overall total, to this year's values.		
165	3	Assessor	Appraisal Personal Property - State-assessed Utilities	State Assessed Utilities - Personal Property	The Application shall allow the user enter state-assessed utilities for personal property and process them through the assessment roll, levy calculation & certification, tax roll and tax collection as required by Washington State Law RCW 84.12.all.		

### 8.3.5. Tables

Many tables are utilized by the personal property staff in performing their duties. Some tables are provided by the state, including Valuation Guidelines, which are provided yearly to all 39 counties by the Washington State Department of Revenue. These tables promote statewide uniformity and standardization in the assessment of personal property.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
251	3	Assessor	Appraisal Personal Property - Tables	Expanded DOR Tables	The user shall be able to add additional codes to the depreciation table provided by the Washington State Department of Revenue (DOR). (Also see specification #249.)		
297	2	Assessor	Appraisal Personal Property - Tables	SIC Code (Standard Industrial Classification) or NAICS (North American Industry Classification System) Valuation Table	The Application shall contain a SIC or NAICS Code valuation table with all valid SIC or NAICS codes, a value for each of these codes, and a field indicating what summarized value category the personal property value should be posted to (for each asset detail line). The table is updated yearly using the same processes that are used to update the expanded DOR table. This valuation table is used (rather than the expanded DOR table) when the account shows an entry in the Discovery supplement field and a valid SIC or NAICS code in the SIC or NAICS code field. Note: We do not know which of the two codes will be in use when we implement the new Application.		
289	3	Assessor	Appraisal Personal Property - Tables	Table Updates	Able to: - Update depreciation tables with information from a data file from the State - Copy prior year's depreciation table to the new year - Update depreciation table manually		

### 8.3.6. Valuation

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
274	3	Assessor	Appraisal Personal Property - Valuation	Asset detail lines - Commercial	The user shall be able to add an unlimited number of asset detail lines. At a minimum, each line shall include fields for: - A unique line identification number - Detail description - Cost - Year purchased - Trend (from expanded DOR Table) - Percent (applied against cost to arrive at value, from DOR Table) - Value		
283	3	Assessor	Appraisal Personal Property - Valuation	Asset Detail Lines - Farm	The user shall be able to add an unlimited number of asset detail lines. At a minimum each line shall include fields for: - A unique line identification number - Detail description - Cost - Year purchased - Trend (from expanded DOR Table) - Percent (applied against cost to arrive at value, from DOR Table) - Value - A field to show whether or not the asset detail line qualifies for the Farm Equipment Exemption		
290	3	Assessor	Appraisal Personal Property - Valuation	Asset detail lines and 'hold' values	The user shall be able to add asset detail lines (commercial and farm accounts) with a hold value. This means that the value is 100% of the amount entered in the cost field.		
292	3	Assessor	Appraisal Personal Property - Valuation	Batch valuation update - commercial and farm accounts	After the new DOR and SIC tables have been entered, the user shall be able to perform a batch valuation update to all accounts based on the new table entries, asset detail information copied from the prior year and the prior year's head of family information.		
264	3	Assessor	Appraisal	Copy/Roll Prior	The Application shall copy/roll all of the prior		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Personal Property - Valuation	Year's Account Information	year's (or last known year's) account information to the future year. The user shall have the ability to perform this update in batch (based on user defined criteria), or on an individual account.		
265	3	Assessor	Appraisal Personal Property - Valuation	Estimate of Value	The user shall be able to add an estimated value to an account due to non-reporting or under-reporting by the property owner. This entry shall be identified as an estimated value in the line item detail description of the account.		
279	3	Assessor	Appraisal Personal Property - Valuation	Head of Family Exemption	The Application shall provide a field for the Head of Family Exemption (\$3,000 for the 2004 assessment for 2005 taxes). When this field is checked, the exemption amount shall automatically post as a negative amount in the corresponding summarized value category.		
266	3	Both Assessor and Treasurer	Appraisal Personal Property - Valuation	Late Filing Penalty	The Application shall apply a late filing penalty (%). This penalty shall be calculated against the total tax owed on the account the year following the assessment of the penalty.		
262	2	Assessor	Appraisal Personal Property - Valuation	Leased Equipment - Cross-reference	The user shall be able to cross-reference lessor and lessee for items assessed as leased equipment. Example: When a business reports leased equipment, the user should be able cross-check to ensure that the leasing company is listed and reported the lease.		
253	3	Assessor	Appraisal Personal Property - Valuation	Leasehold improvements	The user shall be able to track and appraise leasehold improvements as either personal property or real property.		
280	3	Assessor	Appraisal Personal Property - Valuation	Leasing Companies - Master and sub-accounts	The Application shall provide the ability to create a master account and lease sub-accounts for each leasing company.		
319	2	Assessor	Appraisal Personal Property - Valuation	Locate estimated asset detail lines	The user shall be able to locate all accounts that contain an estimated value in an asset detail line and print, view or export the output.		
309	3	Assessor	Appraisal Personal Property - Valuation	Personal Property Discovery - Access database	The department is currently using an Access database for the discovery of new, commercial personal property accounts. Refer to the Personal Property Discovery section of the Software Applications Overview appendix for a description of this database. The proposed Application shall be able to either perform the function of this database, or allow for an upload of all new personal property discovery accounts into the Personal Property Discovery database.		
249	3	Assessor	Appraisal Personal Property - Valuation	Personal Property Valuation	The user shall be able to value all classes of property listed in the depreciation tables (personal property and industrial) provided by the Washington State Department of Revenue yearly. Web Reference: <a href="http://dor.wa.gov/content/taxes/Property/prop_PsnlPropValSched.aspx">http://dor.wa.gov/content/taxes/Property/prop_PsnlPropValSched.aspx</a> .		
277	3	Assessor	Appraisal Personal Property - Valuation	Posting summarized values	The user shall be able to mark on the asset detail line which summarized value category should be assigned to the item. The Application shall total the values and post the totals to the corresponding categories, calculating the account's overall total. This information is required to generate a summary account to the State.		
310	2	Assessor	Appraisal Personal Property -	Processing new personal property discovery	New personal property discovery accounts shall show that the account was established through the discovery process and the date that it was created.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Valuation	accounts	The valuation of these accounts is based on the account's SIC and the SIC table. All other processes for the account follow the requirements for other commercial personal property accounts.		
275	3	Assessor	Appraisal Personal Property - Valuation	Summarized total value categories - Commercial	The total value of a commercial personal property account shall consist of the following categories: - Manufacturing, contracting, logging, and mining machinery and equipment - All other equipment and machinery (office and store equipment and machinery, furniture, tools, etc.) - Supplies and consumables not for sale - Property on exempt land (leasehold improvement assessed as personal property) - Other personal property - Head of Family Exemption		
276	3	Assessor	Appraisal Personal Property - Valuation	Summarized value categories - Farm	The total value of a farm personal property account shall consist of the following categories: - Machinery & equipment - Head of Family Exemption		
278	3	Assessor	Appraisal Personal Property - Valuation	Supplies and consumables not for sale - commercial accounts	The Application shall provide an area to enter an amount for supplies and consumables not for sale and show whether this amount was provided by the property owner or estimated by the appraiser. The amount shown in this field shall automatically post to the corresponding summarized value category.		
284	3	Assessor	Appraisal Personal Property - Valuation	Track number and value of accounts that qualify for the \$500 Exemption	The Application shall track or flag those accounts that result in a \$0 taxable value due to the \$500 Value Exemption. The number of personal property accounts that qualify for this exemption and the assessed value (value loss, since the taxable value is \$0) is required for the Abstract Report that is submitted yearly to the Washington State Department of Revenue.		
287	3	Assessor	Appraisal Personal Property - Valuation	Tracking - Head of Family Exemption	The Application shall track the number of accounts that qualify for a Head of Family Exemption (Commercial, Farm separate counts). These numbers are needed for reports to the Washington State Department of Revenue.		
168	3	Assessor	Appraisal Personal Property - Valuation	Value Exemption < \$500.00 Personal Property	The Application shall accommodate Washington State's value exemption of certain properties that are exempt if the assessed value is < \$500.00. See RCW 84.36.015.		

8.3.7. Value Notifications

A summarized notice of the total value of a commercial personal property account is mailed to the taxpayer. This value, multiplied by the levy rate in the tax code area where the personal property is located, creates the following year's tax bill. Notifications are produced individually or in batch mode.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
301	2	Assessor	Appraisal Personal Property - Value Notifications	Value Notifications - Farm and commercial	Able to generate value notifications either one account at a time or for a batch of accounts. The user is able to schedule the generation of these notifications by entering a future date and time. The print job should start automatically at the predefined time. The Application tracks the date that the valuation notice was generated and the date the notice was mailed. For leasing companies, value notifications are only sent to the master lease account, not the sub account. For a sample, please		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					refer to Appendix G - Report Samples.		

**8.4. ASSESSMENTS**

Clark County envisions implementing an application which will allow for flexibility in the creation, billing and receipting of assessment activity. Clark County desires to create one statement for property owners. This statement shall contain information relating to real property taxes and any and all assessments associated with this account, with the possible exception of County Road Improvement Districts (CRIDs). Each property will carry an account number with all billings directly related to this number be it property taxes or assessments/fees.

**8.4.1. General Assessments**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1029	3	Treasurer	Assessments - General Assessments	Assessment - Clean Water	The Application shall post these receipts to the General Ledger, using a specific account coding per transaction type. Please see accounting code table.		
233	3	Treasurer	Assessments - General Assessments	Assessment and fee billing data upload & processing	A file is received each year that contains all billing information (e.g. the property account number, the assessment amount, and a specific year). A process of verifying that all of the property account numbers are active accounts is required to be run prior to posting the billing detail to each account. The process will produce a report listing the inactive property account numbers, and the new active property account number or numbers that are associated with that inactive property account number. If no inactive property account numbers are found, a report shall be produced stating that as well.		
234	3	Treasurer	Assessments - General Assessments	Assessment and fee line-item on main bill	Clark County currently bills each assessment and fee as separate statements. The Application shall include all current assessments and fees as a line-item detail in the Property Tax statement, creating one bill for the taxpayer.		
1120	2	Treasurer	Assessments - General Assessments	Assessments	Bill detail shall be tied to a specific year, and the Application shall have an option for manual entry of this data as well.		
1039	3	Treasurer	Assessments - General Assessments	Assessments	The Application shall identify which accounts are to be paid by a mortgage company, and which accounts are billed directly to a taxpayer.		
1046	3	Treasurer	Assessments - General Assessments	Assessments	The Application shall retain and associate the receipt numbers and receipt date assigned by the cashiering Application. Posting of application will occur by a functional operator of the Treasurer's Office and will be posted in batch mode		
844	3	Treasurer	Assessments - General Assessments	Assessments - Clean Water	The Application shall have a report to track receivable activity by fee year, where the fee receipts are tied to an fee year.		
592	3	Treasurer	Assessments - General Assessments	Assessments - Delinquents	Delinquent Assessments are assignable to a collection agency. The detailed information associated with the delinquent account shall include collections attempts and communication by County staff. This information shall be forwarded electronically to the collection agency. The Application shall then be identify the accounts which for such activity has occurred.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1035	3	Treasurer	Assessments - General Assessments	Assessments - Drainage Maintenance District	If an account becomes delinquent, the interest and penalty associated with the delinquent account shall be calculated automatically by the Application. (See Interest and Penalty Table)		
1051	3	Treasurer	Assessments - General Assessments	Assessments - Lighting	Assessment and fee information shall be available to the public via Interactive Voice Response (IVR), as well as the Internet. IVR is available only if the property account number is known, whereas the Internet shall be searchable with a property account number or physical address of the property.		
244	3	Treasurer	Assessments - General Assessments	Assessments reported by assessment year	Assessments and fees shall be tied to an assessment and or fee year. Application reports shall be available to track assessment receivable activity by assessment and or fee year.		
232	3	Treasurer	Assessments - General Assessments	Lighting assessment payment due date rules	The Application shall bill for assessments and fees. The Application shall accommodate the following rule: If the assessment bill is less than or equal to a defined dollar amount (currently this is \$50.00), it is due and payable by April 30. If the billed amount is greater than the defined dollar amount, half of the bill is due and payable by April 30. The remainder is due and payable by October 31. Should an account become delinquent, interest and penalties shall be calculated and added to the amount outstanding. For interest and penalty calculations, see interest and penalty table. Both the dollar limits and the payable dates shall be configurable without requiring programming.		
899	3	Treasurer	Assessments - General Assessments	Reports	The Application shall provide for detailed and summary aging reports for each separate assessment and fee type by year by account.		
239	3	Treasurer	Assessments - General Assessments	Separate grouping and accounting for assessments and fees	Assessment and fee receipts shall be grouped separately and accounted for separately, both for the General Ledger and Taxation Application. The assessment receipts shall be further broken down by type. For example, all lighting assessments shall be posted to the General Ledger in one batch, separated from property taxes and other assessments.		

8.4.2. Clean Water

Clean Water fees are billed annually by the Clark County Treasurer’s Office under Clark County Ordinance 13.30A.080. Currently Clean Water Fees are due and payable in full by July 31 of each year.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
842	3	Treasurer	Assessments - Clean Water	Assessment - Clean Water	The Application shall provide a report allowing the user to select a list of receipt properties (e.g., receipt number, date, amount of receipt, fee receipt principal, property account number, payee, property account owner, check number, tender type, fee penalty, fee interest), and will provide this detail for Clean Water fees within a given date range. It will also provide the account posting to the General Ledger that is associated with the Clean Water fees within the date range selected.		
586	3	Treasurer	Assessments - Clean Water	Assessments - Clean Water	Clean Water Fee assessments are billed annually. If an account becomes delinquent, the interest and penalty associated with the delinquent account shall be calculated automatically by the		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					Application. (See Delinquent Interest and Penalty Table)		
593	3	Treasurer	Assessments - Clean Water	Assessments - Clean Water	Clean Water Fee Assessments shall be considered should segregation or combination activity occur on a property. A fee, which has yet to be paid, shall move to a valid account, should segregation or combination create an inactive account.		
594	3	Treasurer	Assessments - Clean Water	Assessments - Clean Water	An adjustment to the Clean Water Fee Assessment shall occur should a property move to or from senior exemption status. The ordinance states that properties that have a senior exempt status qualify for a 50% reduction in the fee charged.		
596	3	Treasurer	Assessments - Clean Water	Assessments - Clean Water	County ordinance requires that when an account becomes delinquent, a lien must be filed against the property. The Application shall create a document that adheres to statutorily mandated recording requirements. The process of recording a lien is date driven, with control by the Treasurer's Office to override this process on an account by account basis. The Application shall then be flagged, noting such activity has occurred.		
599	3	Treasurer	Assessments - Clean Water	Assessments - Clean Water	The Application shall provide a report that lists all receipts within a given date range that contain clean water fees posted to the database, allowing the user to select a list of receipt properties (e.g. receipt number, date, amount of receipt, fee receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, fee interest), with summary totals by fee year and grand total.		
1042	3	Treasurer	Assessments - Clean Water	Assessments - Clean Water	The Application shall produce a report controlled by date that shall show all property tax accounts that contain Clean Water Assessments showing the amount fee changed by year, receipt number, date of payment, payment amount received for fees, total receipt amount received, if any interest and penalty was paid, and what the balance on the property tax account still is. This report shall allow the sorting of information by fee amount, property account number, receipt number, date of payment, payment amount received for fee, total receipt amount received, and interest or penalty amount.		
880	3	Treasurer	Assessments - Clean Water	Lien Fee	At the time a lien document is created for a delinquent Clean Water Account, a fee shall be added to the account, which must be paid along with base, interest and penalty.		

8.4.3. County Road Improvement Districts (CRIDs)

A County Road Improvement district is authorized by RCW 36.88.015. The district is formed to create or improve a shared road with the costs split among the property owners. The property owners are allowed a one time payment to either pay off the entire road improvement district or to make just one payment of any size. If a property owner chooses to make a payment, then their amount due is reduced by the amount paid subsequent payments (principal and bond interest) are calculated on the new amount due based upon a bond issued to finance the remainder of the assessment.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
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ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
921	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	Assessments - County Road Improvement Districts (CRIDs)	The Application shall provide functionality for assessment payoffs as well as display in inquiry mode the correct payoff amount owing to date.		
925	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	Assessments - County Road Improvement Districts (CRIDs)	The Application shall provide accounting to adjust the receivable balance in Oracle Financials General Ledger by the amount fo the assessment payoff at the time of the receipt.		
970	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall accommodate the following: when a County Road Improvement District is authorized, the Application shall allow the property owners a one-time payment, to either pay off their entire road improvement district, or to make just one payment of any size. If a property owner chooses to make a payment, then their amount due is reduced by the amount paid. Subsequent payments (principal and bond interest) are calculated on the new amount due, based upon a bond issued to finance the remainder of the assessment.		
971	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall allow for period billing throughout the year, based upon the due dates for each CRID. CRID's are due and payable on their due date, and considered delinquent 30 days past their due date. Interest and penalty become due on the 31st day after the payment date. Current year cannot be paid if a delinquent year is owing. The oldest year owing shall be paid first, with delinquent interest and penalty paid in full.		
972	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall allow for the creation of statements generated using the current property tax information. Bills are generated 60 days prior to the due date and mailed. These statements include any delinquent interest and penalties on prior years, current year due, and payoff amounts. The in-house bill shall contain an OCR scan line, in OCRA font, as well as a barcode in 3of9 font.		
973	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall allow for when segregation or combination activity occurs on a property, CRID's must be considered. An assessment which has yet to be paid must be moved to a valid account (s), and the remaining principal and bond interest shall be divided between the parcels based upon their respective assessed value(s).		
974	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	When payments are received for a CRID, the Application shall post directly to the property account, including any delinquent interest and penalties. CRID receipts shall be grouped separately and accounted for separately, both for the General Ledger, as well as for the taxation Application. The receipt number assigned at the point of sale, or other receipting Application, and the receipt date, shall be retained when posting the database.		
976	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall allow for the calculation of payoff amounts, delinquent interest, and new bond interest. New bond interest for the next year is calculated after the delinquent date, and becomes due if there is a payoff after the due date. Payoff can occur at any time of the year, and includes the next year's bond interest, remaining principal, and any delinquent interest and penalty, if applicable. If there is delinquent interest and penalty on a payoff, the amount for the payoff is only good for		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					30 days. After the 30 days, new delinquent interest is due.		
977	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall allow for the reconciling of CRID receipts. In order to reconcile between the Application, POS, and Oracle General Ledger, reports shall be generated in the Application, breaking down by CRID, by account, principal, bond interest, delinquent interest and delinquent penalties paid, and the accounts remaining with principal and bond interest due.		
1034	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	The Application shall provide a report allowing the user to select a list of receipt properties (e.g. receipt number, date, amount of receipt, assessment receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, assessment interest), and shall provide this detail for CRID Assessment within a given date range. It shall also provide the account posting to the General Ledger that is associated with the CRID Assessment within the date range selected.		
1037	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	If an account becomes delinquent, the interest and penalty associated with the delinquent account shall be calculated automatically by the Application. (See Interest and Penalty Table)		
1045	3	Treasurer	Assessments - County Road Improvement Districts (CRIDs)	CRID	Application reports: Monthly, the Application shall report all accounts paid in full or installment payments received. This information shall be grouped by CRID's District: property account number, installment principal, installment interest, and delinquent penalty, if applicable. A summary of this data, by CRID's District, shall also be included.		

8.4.4. Department of Natural Resources/Fire Patrol

Clark County collects fire patrol fees for the State Department of Natural Resources. This process uses a flag to identify which properties must pay the DNR fire patrol. Fees are calculated based on the acreage of the property.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
383	3	Both Assessor and Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Calculating DNR Fire Patrol Fees	The Application shall be able to calculate DNR Fire Patrol fees based on regulations provided by the Washington State Department of Natural Resources. The rate structure for the fees changes each year. The user shall be able to change the fee structure without vendor/programmer assistance. See Appendix G, Report Samples, Department of Natural Resources, DNR Letter with New Rates		
1113	2	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Department of Natural Resources/Fire Patrol Refunds	The Application shall allow for Department of Natural Resources/Fire Patrol refund applications to be initiated by the customer over the web.		
382	3	Both Assessor and Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Identifying properties for DNR Fire Patrol	The Application shall provide a mechanism to allow the user to identify a property for DNR Fire Patrol Assessment. The user shall be able to add or remove this flag by batch updates or manually.		
664	3	Treasurer	Assessments - Department of Natural Resources/Fire	Special Fee Assessments - Department of	The Application shall allow for a Washington State Department of Natural Resources (DNR) assessed Fire Patrol, which is billed annually by		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Patrol	Natural Resources - Fire Patrol	Clark County Treasurer's Office for forest fire suppression. Fire Patrol is due and payable on April 30 and October 31, along with regular property taxes. Its payment schedule shall be set the same as regular property taxes. Should an account become delinquent, interest and penalty are calculated, and shall be shown separately.		
673	3	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Special Fee Assessments - Department of Natural Resources - Fire Patrol	The Application shall allow for a Fire Patrol that is calculated on a list of property account numbers that have been flagged for Fire Patrol calculation. It is a flat fee if the parcel is less than 50 acres, or is a flat fee plus X cents per acre over 50 acres in size. The parcel shall have acres associated with it in order for this calculation to work.		
703	3	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Special Fee Assessments - Department of Natural Resources - Fire Patrol	The frequency of payments shall be posted daily from the taxation Application to the Oracle General Ledger. The Application shall transfer to the Oracle General Ledger at a summary level by fund, and transfer based on the date of the transaction. The Application shall allow for reporting prior to posting to the General Ledger to ensure accuracy.		
704	3	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Special Fee Assessments - Department of Natural Resources - Fire Patrol	The Application shall allow for reporting so that a list of individual parcels that have Fire Patrol paid on them for a specific day shall be generated and tied back to the daily cash received for the day. The allocation of these types of fees shall also be able to be traced back from the property receipt to the exact fund it was allocated to.		
705	3	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Special Fee Assessments - Department of Natural Resources - Fire Patrol	Receivable reports shall be able to be generated on a daily, weekly, monthly, or yearly basis.		
706	3	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Special Fee Assessments - Department of Natural Resources - Fire Patrol	The Application shall allow for the manual removal of fees, with the appropriate accounting entries flowing through the Application.		
1071	3	Treasurer	Assessments - Department of Natural Resources/Fire Patrol	Special Fees-Fire patrol	The Application shall add an administrative fee to Fire Patrol assessment. This shall occur at the time taxes are created annually. This fee shall be recorded in Oracle General Ledger to a unique fund.		

**8.4.5. Drainage Maintenance Districts & Diking Districts**

Drainage Maintenance and Diking District Assessments are billed once a year by the Clark County Treasurer’s Office. At the time the District Commission establishes their annual budget, an assessment roll is created. The assessment role contains property detail to include the property account number the dollar amount per acre that is assessed as well as the total acres for a property. The Clark County Treasurer’s Office also includes a fee (\$2.00 up to \$4.00) on each account. Should an account become delinquent interest and penalties accrue (see interest and penalty table). Payments are due on or by April 30 of each year.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
585		Treasurer	Assessments - Drainage	Assessments - Drainage	The Application shall group Drainage Maintenance and Diking District receipts		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Maintenance Districts & Diking Districts	Maintenance Districts	separately from other assessments, and accounted both for in the General Ledger.		
728	3	Treasurer	Assessments - Drainage Maintenance Districts & Diking Districts	Assessments - Drainage Maintenance Districts	The entire Drainage Maintenance and Diking District assessments shall be posted to the General Ledger in one batch, by day, separated from property taxes and other assessments.		
729	3	Treasurer	Assessments - Drainage Maintenance Districts & Diking Districts	Assessments - Drainage Maintenance Districts	The Application shall provide a report that lists all receipts within a given date range that contain drainage maintenance and diking district assessments posted to the database, allowing the user to select a list of receipt properties (e.g. receipt number, date, amount of receipt, assessment receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, assessment interest) with summary totals by assessment year and grand total.		
846	3	Treasurer	Assessments - Drainage Maintenance Districts & Diking Districts	Assessments - Drainage Maintenance Districts	The Application shall provide a report allowing the user to select a list of receipt properties (e.g. receipt number, date, amount of receipt, assessment receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, assessment interest), and will provide this detail for Drainage assessments within a given date range. It shall also provide the account posting to the General Ledger that is associated with the Drainage assessments within the date range selected.		
1043	3	Treasurer	Assessments - Drainage Maintenance Districts & Diking Districts	Assessments - Drainage Maintenance Districts	The Application shall produce a report, controlled by date, that shall show all property accounts that contain Drainage Assessments showing the amount assessed by year, receipt number, date of payment, payment amount received for assessment, total receipt amount received, if any interest and penalty was paid, and what the balance on the property tax account still is. This report shall allow the sorting of information by assessment amount, property account number, receipt number, date of payment, payment amount received for assessment, total receipt amount received, and interest or penalty amount.		

8.4.6. Lighting

Lighting Assessments are billed annually by the Clark County Treasurer’s Office on behalf of Clark Public Utilities under RCW 54.24.010. Lighting Assessments, if billed for less than \$50.00, are due and payable in full by April 30 of each year. If the billed amount is greater than \$50.00 only half of the bill is due and payable on or by April 30 of each year. The second half is due and payable on or before October 31 of each year.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1044	3	Treasurer	Assessments - Lighting	Assessments - Lighting	The Application shall produce a report controlled by date that will show all property accounts that contain Lighting Assessments, showing the amount assessed by year, receipt number, date of payment, payment amount received for		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					assessment, total receipt amount received, if any interest and penalty was paid, and what the balance on the property account still is. This report shall allow the sorting of information by assessment amount, property account number, receipt number, date of payment, payment amount received for assessment, total receipt amount received and interest or penalty amount.		
235	3	Treasurer	Assessments - Lighting	Flag accounts to be paid by mortgage companies	In Clark County, lighting assessments are paid by some mortgage companies, but not all. The Application shall identify which accounts are to be paid by a mortgage company, and which are billed directly to the taxpayer. Mortgage reference information is received twice per year as a flat-file from the tax servicing agencies. The Application shall upload these files, and use them to identify each account.		
241	3	Treasurer	Assessments - Lighting	Report - lighting assessment General Ledger postings	The Application shall provide a report allowing the user to select a list of receipt properties (e.g. receipt number, date, amount of receipt, assessment receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, assessment interest), and will provide this detail for lighting assessments within a given date range. It will also provide the account posting to the General Ledger that is associated with the lighting assessments the given date range selected.		
240	3	Treasurer	Assessments - Lighting	Report - lighting assessment postings	The Application shall provide a report that lists all receipts within a given date range that contain lighting assessments posted to the database, allowing the user to select a list of receipt properties (e.g., receipt number, date, amount of receipt, assessment receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, assessment interest), with summary totals by assessment year, and grand total.		

8.4.7. Water Utility Districts

Water Utility District Assessments are billed twice a year by the Clark County Treasurer’s Office on behalf of Clark Public Utilities under RCW 36.94.220. At the time the final assessment roll is established through resolution by Clark Public Utilities, Clark County receives documentation which defines the complete district. All participants who are named in the documentation are given 30 days to make payment in whole or in part without any interest. Thereafter the sum remaining unpaid on any such assessment is billed over 10 years, in 20 equal installments, due April 30 and October 31.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1033	3	Treasurer	Assessments - Water Utility Districts	Assessments - Water Utility	The Application shall provide a report allowing the user to select a list of receipt properties (e.g., receipt number, date, amount of receipt, assessment receipt principal, property account number, payee, property account owner, check number, tender type, assessment penalty, assessment interest), and will provide this detail for Water Utility District assessments within a given date range. It will also provide the account posting to the General Ledger that is associated		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					with the Water Utility District Assessment within the date range selected.		
569	3	Treasurer	Assessments - Water Utility Districts	Assessments - Water Utility Districts	Application reports: Monthly, the Application shall generate a report on all accounts paid in full, or installment payments received. This information shall be grouped by Water Utility District: account number, installment principal, installment interest, and delinquent penalty, if applicable. A summary of this data, by Water Utility District, shall also be included.		
726	3	Treasurer	Assessments - Water Utility Districts	Assessments - Water Utility Districts	The Application shall process interest-free payments for the first 30 days of the billing period (days shall be a variable field). Thereafter, and for the next 10 years (years shall be a variable field), the Application shall process installment payments comprised of principal amount owed, plus interest and penalty for any amounts considered delinquent. (See Interest and Penalty Table)		
1031	3	Treasurer	Assessments - Water Utility Districts	Assessments - Water Utility Districts	The Application shall post these receipts to the General Ledger using a specific account coding per transaction type. Please see accounting code table.		
910	3	Treasurer	Assessments - Water Utility Districts	Reporting	The Application shall provide a report for all accounts that have been paid in full. This information shall contain the account number, the dollar amount of payoff, and date received.		

**8.5. CREATION OF TAXES, MAINTENANCE, AND BILLING**

The Application shall allow for fully integrated management of property tax receivables, from creation through adjustments to billings. It is the intent of this RFP to find an application that shall provide a seamless process to create property taxes from levy calculations to property tax billings to accounting entries to post to the Oracle Financial General Ledger for property tax receivables and revenues.

This Application will provide detail history on all adjustments to the taxes created from property account history on the customer service screens and reports through to billings through to adjusting accounting entries to the receivables and revenues on the General Ledger.

The Application shall account and report all property tax receivables by fund by levy year. It is the intent of Clark County to track receivables in compliance with GASB 41.

**8.5.1. Levy Certification**

**8.5.1.1 Calculating Levies**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
862	3	Assessor	Levy Certification - Calculating Levies	1% Levy Limit, and 5.90 Levy Limit - Report	The Application shall generate reports that allow the user to verify/check the 1% and 5.90 levy limits.		
516	3	Both Assessor and Treasurer	Levy Certification - Calculating Levies	Calculate levies	The Application shall calculate levies, and provide documentation to the Washington State Department of Revenue and taxing districts, in accordance with RCW 84.52.all.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
420	3	Assessor	Levy Certification - Calculating Levies	Highest lawful levy	The Application shall be able to store the highest lawful levy amount for each taxing district back to 1985 and shall use that number as the starting figure for each year's levy calculation. The user shall be able to overwrite this figure.		
418	3	Assessor	Levy Certification - Calculating Levies	Levy calculation and limitations	The Application shall be able to calculate levies and verify levy limitations according to RCW 84.52.all and 84.55.all. The Application shall be able to process three calculations for each taxing district: 101% limitation, budget calculation, and statutory limit.		
421	3	Assessor	Levy Certification - Calculating Levies	Levy calculation reports	The Application shall provide levy calculation reports by tax code area and by taxing district that include the total assessed value and parcel count, broken down by: - Real property - Personal property - State assessed utilities (real and personal) - Exempt properties - Timber assessed value - Senior exempt values (broken down by the three income levels and total value)		
419	3	Assessor	Levy Certification - Calculating Levies	Restarting the levy calculation process	The Application shall allow the levy specialist to restart the levy calculation process. For example, the levy specialist loads values into the certification database on October 1, 2004. A large value change that occurs on October 15 requires that values are reloaded into the certification database to restart the levy calculation process.		
400	3	Both Assessor and Treasurer	Levy Certification - Calculating Levies	Tax code areas, taxing districts and fund numbers	The Application shall allow the creation of new tax code areas and assign fund numbers. There shall be one fund number for each taxing district. The taxing district has multiple tax code areas.		
399	3	Assessor	Levy Certification - Calculating Levies	Track value by categories for levy calculation/certification	The Application shall be able to track multiple assessed values by category for use in the computation of the levy rate. For example, the total assessed value for the senior citizen exemptions (broken down by the three income levels), the timber assessed value, state assessed utilities, annexations, new construction values, parcel counts and breakdowns by tax code area and taxing district.		

**8.5.1.2 Taxing District Notifications**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
423	3	Assessor	Levy Certification - Taxing District Notifications	Calculation forms	The Application shall have reports to submit to each taxing district. Reports shall include the levy calculations including the 101% calculation, the budget calculation, the statutory limit calculation, administrative refund calculations, excess levy calculations, as well as listing their highest lawful levy for future year calculations.		
424	3	Assessor	Levy Certification - Taxing District Notifications	Levy certification report for each taxing district	The Application shall have detailed reports to submit to each taxing district notifying them of the taxes to be collected, detailed by fund.		
422	3	Assessor	Levy Certification - Taxing District Notifications	Value letters to taxing districts	The Application shall have detailed reports to submit to each taxing district (value letter) notifying them of the total assessed value, senior exempt values that will not be taxed, new construction values, timber assessed values, and taxable values for both general funds and levy/bond funds. See Appendix G, Report Samples, Levy Certification, Certified Assessed		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					Value Letter		

### 8.5.1.3 Training Databases

The Levy Certification process is a complicated process requiring inputs from a variety of sources. Our goal is to cross-train staff to run this process. As part of the cross-training and quality control, it is our desire to have the ability to enter and save all of the parameters for the Levy Certification as separate scenarios. The Levy Certification process should be able to run multiple scenarios in a trail or “What If” mode.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
477	3	Assessor	Levy Certification - Training Databases	Levy calculation scenarios	The user shall be able to run the levy calculation/certification process multiple times as a scenario without making any changes to live data.		
480	3	Assessor	Levy Certification - Training Databases	Levy calculation/certification scenarios	The user shall be able to generate all reports, forms, letters, etc. from levy calculation/certification scenarios in the same way they are generated from the live database.		
478	3	Assessor	Levy Certification - Training Databases	Levy calculation/certification scenarios	The user shall be able to save and compare levy calculation/certification scenarios.		
398	3	Both Assessor and Treasurer	Levy Certification - Training Databases	Training databases for levy calculations/certification	The Application shall have up to three additional training databases for the levy calculation/certification processes. These databases shall function in the same manner as the production database, and shall allow employees to perform levy calculations/certification parallel with the levy specialist for training and cross-check purposes.		

### 8.5.1.4 What if Mode

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
425	3	Both Assessor and Treasurer	Levy Certification - What-if Mode	Estimates of values and levy calculations	The Application shall process estimates of levy calculations or projections of what if situations at any time of the year. The Application shall allow the user to access current assessed values, as well as manually enter values to estimate outcomes of annexations, LID lifts, etc.		

## 8.5.2 Certification of Taxes and Creation of Assessment and Tax Rolls

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
413	3	Assessor	Certification of Taxes and Creation of Assessment and Tax Rolls	Certificate of New Construction Form	The Application shall be able to generate the Certificate of New Construction Form (RCW 36.21.080 & 84.40.040). See Appendix G, Report Samples, Management Level Quality Assurance Multiple Processes Assessor, Filled-out New Construction Certification Form		
412	3	Assessor	Certification of Taxes and Creation of Assessment and Tax Rolls	Create and certify assessment rolls - Real/Personal	The Application shall be able to create the real and personal property assessment rolls and generate the assessment roll certification form (RCW 84.40.040). See Appendix G, Report Samples, Management Level Quality Assurance Multiple		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					Processes Assessor, Filled-out Reval Certification Form		
411	3	Both Assessor and Treasurer	Certification of Taxes and Creation of Assessment and Tax Rolls	Create and certify tax rolls - Real/Personal	The Application shall create the real and personal property tax rolls, and generate the tax roll certification form (RCW 84.52.080).		

**8.5.3 Cancellations and Supplements**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
874	3	Treasurer	Cancellations and Supplements	Cancellations and Supplements	The Application shall integrate seamlessly between the CAMA Application, the taxation Application, and Oracle General Ledger.		
875	3	Treasurer	Cancellations and Supplements	Cancellations and Supplements	The Application shall be able to handle the prorating of taxes based upon Washington State RCWs.		
876	3	Treasurer	Cancellations and Supplements	Cancellations and Supplements	When values have been adjusted by the Assessor's Office via the CAMA Application, the Application shall cancel taxes or supplement taxes. The cancellation or supplementing of taxes shall occur through a workflow process, with the appropriate approval levels and audit trails.		
427	3	Both Assessor and Treasurer	Cancellations and Supplements	Changing prior years' values - Real/Personal	The Application shall allow the user to access (or create) prior year's information, edit the information to generate a corrected (or new) value for the prior year, automatically update the database with the corrected (new) values, and generate a cancellation or supplement form. This shall be completed with the appropriate audit trails and approval levels. Prior year's information shall include value information, tax billing information, and receipt or payment information. The Application shall allow the user to add prior year information, should it need to be edited after it has been archived from the database. The Application shall allow this to occur by single account, or in groups.		
428	3	Both Assessor and Treasurer	Cancellations and Supplements	Value changes for prior years integrated with Treasurer's system - Real/Personal	When the user processes a change for a prior year's assessment, the Application shall automatically change the corresponding tax information without additional manual data entry by the Treasurer's staff.		
143	3	Both Assessor and Treasurer	General Functional Requirements	Agents - Real/Personal	Some property owners assign an agent (e.g., third-party property management firm) to handle all of his/her property related business affairs. The Application shall allow the user to: - Maintain information on one or multiple agents per property; - Assign multiple properties to one agent; - Define authorities for each agent on each property; - Identify employees at the agent's company. - Define which Application-generated correspondence shall be sent to the agent only, the property owner only, or both.		

**Questions**

882	Describe how the Application tracks cancellation / supplements.
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### 8.5.4 Combinations

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
401	3	Both Assessor and Treasurer	Combinations	Combinations	The Application shall combine properties, in an automated manner, that requires minimal data entry by the user, and is integrated with the Treasurer's Application, updating the tax information, including any assessments associated with the existing properties.		
238	3	Treasurer	Combinations	combinations	The Application shall accommodate the following rule: An assessment which has yet to be paid, or paid in part, must move to a valid account, should the segregation or combination create an inactive account.		
499	3	Both Assessor and Treasurer	Combinations	Combinations and history records	The combination transaction shall be recorded such that the parcel history can be easily reconstructed.		
498	3	Both Assessor and Treasurer	Combinations	Combinations and tax relief programs	The combination process shall accommodate properties with special tax relief assessments, such as senior citizen exemptions and current use.		
935	3	Treasurer	Combinations	Combination information	The Application shall have a mechanism for tracking information related to combinations such as receipt information.		
519	3	Assessor	Combinations	Tracking combinations	The user shall be able to track combinations from their initial creation to the revaluing of the resultant parcel(s).		
497	3	Both Assessor and Treasurer	Combinations	Unlimited number of properties	The Application shall allow for an unlimited number of properties to be combined. (If not, please indicate the maximum number of properties that can be combined in a single combination process.)		
1099	2	Assessor	Combinations	User defined criteria for data to be moved during combinations	The Application shall allow the copying/pasting/moving of data, photos and sketches from one parcel to another based on user defined criteria or business rules.		

### 8.5.5 Segregations

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
415	3	Both Assessor and Treasurer	Segregations	Segregations	The Application shall be able to segregate properties, in an automated manner, that requires minimal data entry by the user, and is integrated with the new taxation Application. For example, a GIS data file containing the parent parcel and resultant parcel(s) information regarding values, size, topography, ownership, etc., shall be used to segregate the property and update the Application.		
934	3	Treasurer	Segregations	Segregations and special assessments	The Application shall accommodate the handling of special assessments, such as lighting assessments or Clean Water Fees when a segregation occurs as allowed for in accordance the appropriate RCW's.		
521	3	Assessor	Segregations	Tracking segregations	The Application shall track segregations from their creation through the revaluation of all parcels associated with the segregation.		
409	3	Assessor	Segregations	User-defined criteria for data to be moved during segregations	The Application shall allow the copying/pasting/moving of data (including photos and sketches) from a parent parcel(s) to the resultant parcel(s) to be based on user-defined criteria or business rules. For example: User decides whether or not valuation flags, situs address, etc., should be copied/pasted/moved to the resultant parcel(s).		

### 8.5.6 Judgments

Per RCW 84.56.240, the County Treasurer is to prepare and present a list of uncollectible personal property taxes to the Board of County Commissioners by the first Monday of February of each year.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
560	3	Treasurer	Judgments	Judgments	The Application shall have a report which lists, by account, uncollectible personal property taxes, and the date the action took place.		
719	2	Treasurer	Judgments	Judgments	The Application shall provide the means to cancel any personal property taxes more than four years delinquent.		
895	3	Treasurer	Judgments	Judgments	The Application shall track a judgment tied to several Property Account Numbers, and generate a report to adjust taxes.		

### 8.5.7 Annexations

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
572	3	Treasurer	Annexations	Finance - Annexations	When an annexation occurs, the Application shall change, for the properties involved, the specific tax code area, and have all changes documented and available for customer service representatives.		
573	3	Treasurer	Annexations	Finance - Annexations	a) The Application shall create a shift in the receivables FROM one code area TO another code area. This includes all necessary documentation. b) All subsequent taxes collected shall flow through the distribution process to the proper (new) code area.		
574	3	Treasurer	Annexations	Finance - Annexations	The Application shall track and report results from annexations to include: The tax statement shall indicate the change in jurisdictions.		
757	3	Treasurer	Annexations	Finance - Annexations	The Application shall produce a report listing the property accounts affected by the annexation.		
758	3	Treasurer	Annexations	Finance - Annexations	The Application shall track and report results from annexations to include: A report on the REVENUE shifts between tax code areas as a result of the annexation.		
759	3	Treasurer	Annexations	Finance - Annexations	The Application shall produce a report showing the Receivables shift between tax code areas as a result of the annexation.		

### 8.5.8 Tax Relief

#### 8.5.8.1 Tax Relief - 30 % Homeowner's Exemption

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
447	2	Assessor	Tax Relief - 30 % Homeowner's Exemption	30% Exemption	The Application shall enable the user to print a 30% Remodel Exemption form as shown in Appendix G, Report Samples, 30% Homeowners Exemption.		
446	3	Assessor	Tax Relief - 30 % Homeowner's Exemption	30% Exemption	In accordance with RCW 84.36.400, the Application shall be able to concurrently produce and track a reduced assessed value together with the full appraised value and shall be able push the reduced assessed value to the Treasurer's tax Application.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
437	3	Both Assessor and Treasurer	Tax Relief - 30 % Homeowner's Exemption	30% Homeowner's Exemption	The Application shall administer and track the 30% Homeowners' Exemption as described in RCW 84.36.400.		

**8.5.8.2 Tax Relief - Destroyed Property**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
444	2	Assessor	Tax Relief - Destroyed Property	Destroyed Property	Upon activating the Destroyed Property module, the Application shall automatically notify the user that more than one building exists on the parcel.		
442	2	Assessor	Tax Relief - Destroyed Property	Destroyed Property	The Application shall allow users to print a Destroyed Property Form as shown in Appendix G, Report Samples. Vendors should reference RCW 84.70 for background information.		
445	3	Assessor	Tax Relief - Destroyed Property	Destroyed Property	In the case of multiple buildings on one parcel, each with a differing degrees of destruction/damage, the Application shall allow the user to make adjustments specific to each building.		
443	3	Both Assessor and Treasurer	Tax Relief - Destroyed Property	Destroyed Property	Accounting for Destroyed Property is a multi-user process. The Application shall incorporate workflow tracking in such a way that the appraiser shall update and revalue the destroyed parcel, then electronically send the work to the Treasurer for the tax component (refund) etc.		

**8.5.8.3 Tax Relief - Historic and Multi-Family Tax Abatement**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
450	3	Assessor	Tax Relief - Historic and Multi-Family Tax Abatement	Historic and Multi-Family Tax Abatement	Application shall incorporate necessary functionality to implement tax abatements per: Multi-Family Tax Abatement: RCW 84.14.020 and Vancouver Municipal Code VMC 3.22		

**8.5.8.4 Tax Relief - Senior Citizen and Disabled Property Owners**

Per RCW 84.36.all and WAC 458.16A, Clark County is required to have the ability to calculate senior citizen frozen values, market values, and taxable values.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1073	3	Treasurer	Tax Relief - Senior Citizen and Disabled Property Owners	Reports	The Application shall query the database to determine which accounts qualify for the highest level senior exemption status and have a tax bill for the current year that is greater than a variable dollar amount. The information associated with the account such as property owner, mailing address, current year tax bill amount and the amount of money the property owner is allowed to make as part of this program shall be used to prefill a form or template associated with Tax Work Off Activity. The formula for determining the amount of money the property owner is allowed to make is the current tax year bill amount less than a variable dollar amount.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
434	3	Both Assessor and Treasurer	Tax Relief - Senior Citizen and Disabled Property Owners	Senior Citizen and Disabled Property Owners Exemption	The Application shall administer the senior citizen and disabled property owner's exemption according to RCW 84.36.all.		
436	3	Assessor	Tax Relief - Senior Citizen and Disabled Property Owners	Senior citizen and disabled property owners exemption - audits	The user shall be able to select parcels for audits (random selection criteria and/or those that were previously marked to be audited), generate audit letters and forms for property owners and track the audit process.		
369	3	Both Assessor and Treasurer	Tax Relief - Senior Citizen and Disabled Property Owners	Senior Citizen and Disabled Property Owners Exemption - Integration	The Application shall be fully integrated with all other valuation programs (market value and current use assessments). Example: When a market value change is done, the change shall automatically adjust the senior exemption values/calculation accordingly.		
1111	2	Both Assessor and Treasurer	Tax Relief - Senior Citizen and Disabled Property Owners	Tax Relief - Senior Citizen and Disabled Property Owners notices	The Application shall allow for notices to be generated communicating with property owners who qualify for a senior citizen tax exemption that no taxes are due. This notice shall be created in mass or individually. The Application shall allow for the creation of a file as well as a notice should the process become outsourced.		
435	3	Both Assessor and Treasurer	Tax Relief - Senior Citizen and Disabled Property Owners	Workflow process for senior citizen and disabled property owner's exemption	The Application shall have a workflow process that allows the user to track the processing of a senior citizen exemption from mailing the form (application), to receipt of the form, verification, application update, property owner notification, new taxation application update, audit, refunds, etc.		

**8.5.9 Creation of Tax Assessment Fees & Bills**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
588	3	Treasurer	Creation of Tax Assessment Fees & Bills	Assessments - Clean Water	The Application shall add the Clean Water Fee line item amount to the Property Tax Statement, creating one bill for taxpayers.		
832	3	Treasurer	Creation of Tax Assessment Fees & Bills	Creation of Tax Assessment Fees & Bills	Should Clark County decide to bill all assessments, fees and taxes on one statement, the Application shall accommodate the different payment requirements the County may impose. For example, taxes are billed at \$1000.00, a lighting assessment is \$23.00, and a clean water fee is \$33.00. The first half statement should require the taxpayer to send in \$556.00, and the second half should require the taxpayer to pay \$500.00. The Application shall be flexible to accommodate a change in payment requirements should the County indicate this is necessary.		
1021	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax billing	The Application shall create information on the annual statement which documents the tax and/or fees that is reportable to the Internal Revenue Service.		
781	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall be able to create data files for property tax, assessment, and fee accounts. The data shall be sent electronically to an outside vendor to allow for the creation of statements. The Application shall have the flexibility to create mailings at will.		
782	3	Treasurer	Creation of Tax Assessment	Tax Creation and Billing	The Application shall identify and track accounts that are to be paid through a mortgage company. Those accounts identified as being paid through a		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Fees & Bills		mortgage company do not receive a tax statement.		
783	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall create a file for accounts that reference a mortgage company, to enable inclusion of property account number, mortgage company reference, and owner information. This information shall be created at will.		
805	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall allow for the creation of statements at will. This process shall be done in-house. The statement shall contain property account number, owner information, situs address, assessed value, tax code area, levy breakdown, any and all delinquencies, and current year tax information. The statement shall have a payment coupon which contains an OCR scanline and a barcode.		
806	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall document in the audit trail when a statement has been generated. The Application shall document if the statement was generated and requested by a staff member, IVR, WEB, due to a cancellation supplement, or a file was sent to the vendor for mass generation.		
807	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall create post-petition statements for all accounts that are noted as being in bankruptcy. For example, if an account filed bankruptcy in 2001 and the bankruptcy is still active, statements shall only be generated for 2002 and forward. A note shall be documented on the statement which indicates prior years are owing but account is in bankruptcy.		
808	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall allow for text messages to be included on all statements. This includes mass-generated statements and those generated in-house. The text messages shall be modifiable by Treasurer's Office staff to accommodate changing needs and communication items. The text messages shall be triggered by particular items on the account. For example, should an account only show current year taxes owing, a message shall indicate on the account that taxes may be paid at any First Independent Bank branch.		
809	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall identify when an account has been forwarded to a collection agency. In an automated fashion, any property or assessment, year-specific to an account, that has been forwarded to a collection agency, shall not print on a statement. This shall be decided by Treasurer's staff at the time of creation. This shall include any method of creation; individual generic statements generated in-house, or mass-generated by a third party vendor.		
829	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall be able to differentiate between taxing districts when creating files for mass-generated statements. Should a city decide to send a unique mailing to their customers using the property tax statement as the mechanism, the Application shall accommodate this.		
830	3	Treasurer	Creation of Tax Assessment Fees & Bills	Tax Creation and Billing	The Application shall accommodate assessments and taxes billed on one statement to include the unique penalty and interest calculations for each assesment type (see interest and penalty table).		

8.5.10 Current Use Assessments

**8.5.10.1 General Requirements**

In the early 1970’s, the State of Washington legislature enacted two laws granting tax relief to property owners. Properties eligible for this program are taxed on their “current use” (value in use), rather than their “highest and best use” (market value). To qualify for this relief, property owners must make application and if approved, must engage in a continuing activity to maintain their status in the program. Property owners can voluntarily leave the program, apply to change classifications, or may be disqualified from the program by the assessor. Each of these situations causes a series of events/activities that need to be tracked and followed to completion. When a property is removed from the program, the liability for deferred taxes, interest, and penalty may or may not be imposed. Also, removals can be in whole or only part of the classified acreage. The calculation, process, and procedures are different under the two laws.

The two laws are the Open Space Taxation Act and Forest Land. There are three classifications within the Open Space Taxation Act: Farm and Agricultural Lands, Timber Lands, and Open Space Lands. The Open Space Lands classification has 5 subcategories and within each of these, there are further qualifying categories. It is extremely important to be able to easily identify the specific criteria under which each application was approved. Historically, the legislature and County commissioners have made changes to these laws. It is very important that the system be flexible in order to adapt to any future law changes.

All processes—from application to valuation to removal—should be fully automated and integrated into all other programs, avoiding duplicate data entry. Through a workflow process, the user should be able to electronically forward and track documents, notes, forms, etc.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
353	3	Both Assessor and Treasurer	Current Use Assessments - General Requirements	Administer the Current Use assessment program	The Application shall administer the Current Use assessment program as described in RCWs 84.33.all and 84.34.all.		
352	3	Assessor	Current Use Assessments - General Requirements	Current Use assessments fully integrated with other programs	The current use assessment tools shall be fully integrated with all programs. For example, a change in the market value of a property are automatically posted to the program that calculates the current use assessed value; changes to the land characteristics are automatically applied to the current use assessment program without the need of duplicate data entry or batch updates, etc.		
323	2	Assessor	Current Use Assessments - General Requirements	Current Use Forms	Forms that are used for the current use assessment process shall be available in the Application. The user shall be able to edit the layout and content of the form (Example: DOR makes changes to the form), and complete the form in an automated manner (Example: Information that is stored in the Application shall be automatically loaded into the form, rather than manual data entry). See Appendix G, Report Samples, Special Assessment		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					for samples of existing forms.		

### Questions

911	Please describe how you shall administer the Current Use assessment program as described in RCWs 84.33.all and 84.34.all.						
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#### 8.5.10.2 Applications

**Current process:** A property owner will submit an application for a current use classification between January 1 and December 31, along with the required application fee. A current use folder will be created with the application and receipt for the application fee payment. The folders will be divided into two groups: Timber Land and Open Space Land applications, and Farm and Agricultural Land and Designated Forest Land applications. The reason for this division is the approval process is different for each group. Timber/Open Space applications are handled by Community Development with the Clark County Board of Commissioners approving; the Farm & Ag/DFL applications are reviewed and approved by the Assessor's office. Each group follows a separate process for reviewing the applications. Hardcopies of all notes from field inspections and meetings are documented and put in each folder. Once each group has determined the outcome for each of their applications (approval, partial approval, denial), notices are sent for all applications informing the property owner of the outcome.

**Envisioned new process:** We would like the ability to mark a property when an application has been received, track the application process electronically, attach corresponding data files, attach scanned images, enter notes, identify what type of application was made, forward information electronically and note the outcome of the application process. All notes, documents, data files, etc. associated with these transactions should be identified as being part of the current use application process.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
314	3	Assessor	Current Use Assessments - Applications	Identify current use classification	The Application shall show which type of current use classification was approved (by application number) and is used for the current use assessment.		
315	3	Assessor	Current Use Assessments - Applications	Identify Open Space lands criteria	When a property owner's application has been approved for the Open Space classification, the Application shall show which specific criteria of this program was approved.		
317	2	Assessor	Current Use Assessments - Applications	Notes, data files and scanned documents	The Application shall track and store all notes, data files, scanned documents, etc. associated with the current use application process and identify them as such.		
351	3	Assessor	Current Use Assessments - Applications	Track classification by application	The Application shall track the classification by application number. For example, a property may qualify for the current use program with more than		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
				number	one application number and more than one classification type.		
316	2	Assessor	Current Use Assessments - Applications	Track current use application	The Application shall provide a mechanism that allows the user to track/check on the progress of a current use application, from the time of submission, to either approval or denial of the application.		

**8.5.10.3 Appraisal**

Source valuation data comes from two sources: the Farm Advisory Group provides land rental values, and the State of Washington provides an interest rate, property tax component, and timber stumpage values. Currently we take these values, enter them into an Excel spreadsheet, and calculate a Rate per Acre and Capitalization Rate. Current use values are broken down by soil type as inventoried by the US Department of Agriculture in 1972.

**Current process:** We enter the information into CATS tables and run a recalculation program to calculate each parcel’s current use value. To check the accuracy of this process, the values on each parcel are checked by downloading from CATS all values into an Excel spreadsheet, grouped by soil type and compared to the original Rate per Acre calculation. Errors are either corrected in the Rate per Acre table or on individual parcels, as necessary.

**Envisioned new process:** The new system should provide an automated mechanism for this process. The system should calculate the information needed to enter into the valuation tables. The system should allow for batch updates and have the ability to recalculate current use values as changes are made to an individual property. Example: If the soil type on a property is changed, the system should automatically recalculate the new values based on the corrected information.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
354	3	Assessor	Current Use Assessments - Appraisal	Current Use valuation history	The Application shall retain at least 10 years of current use valuation history. This information is needed when calculating the compensatory tax.		
355	3	Assessor	Current Use Assessments - Appraisal	Current Use valuation tables	Based on information submitted by the Washington State Department of Revenue and Clark County's Farm Advisory Board, the Application shall be able to automatically calculate new rates and update the valuation table(s). See Appendix G, Report Samples, Special Assessment - Application for sample forms		
356	3	Assessor	Current Use Assessments - Appraisal	Portion of property valued as current use	The Application shall allow the user to value only a portion of a property under the current use assessment program, while the remainder of the property is valued at full market value. The combined value of the two portions is the taxable value of the property.		
518	3	GIS	Current Use Assessments - Appraisal	Unique identifiers for property areas	For different areas of a property, the Application shall provide unique identifiers that can be tied to the GIS.		

#### 8.5.10.4 Removals

Current Use is a legislatively-enacted tax relief—not a tax forgiveness program. When land is removed from classification, the deferred taxes, applicable interest, and penalty may be applied with the current owner (compensatory tax). Land can be removed in whole (all of the classified land in a parcel) or in part (only a portion of the land in a parcel). Depending on the classification, the compensatory tax is calculated differently. However, similar source data is necessary: we need to identify the soil type and associated assessed value, and we need to identify the topography and its associated market value for up to the last ten (10) years. From this information, combined with the levy rate for each year and the date of removal we are able to calculate the compensatory tax.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
381	3	Assessor	Current Use Assessments - Removals	Ability to void a current use removal	The user shall be able to void a current use removal. The history of the property shall retain all the preceding removal activities and shall show that the transaction was voided. The voiding of a current use removal will flow through to the creation of an invoice taking into consideration all the accounting entries that must be created.		
360	3	Both Assessor and Treasurer	Current Use Assessments - Removals	Creating a current use removal form	The Application shall have an automated mechanism to create a current use removal form. The information required to prepare this form shall be stored in the database, and the user shall be able to generate the form with little or no manual data entry. Also see ID #357. See Appendix G, Special Assessment - Excise for samples of Removal forms		
357	2	Assessor	Current Use Assessments - Removals	Estimates of compensatory tax for removals	The Application shall have an automated mechanism to create estimates of compensatory tax for removals. The information required to prepare this estimate shall be stored in the database, and the user shall be able to generate the estimate with no or little manual data entry. This is the same form as described in ID #360, however, it is generated and sent to the taxpayer as an estimate and should not affect taxes until the user marks it as a removal. See Appendix G, Report Samples, Special Assessment - Estimates for a sample form		
361	3	Both Assessor and Treasurer	Current Use Assessments - Removals	Tracking and processing current use removals	The Application shall show that a current use removal was created. The user shall be able to view and/or reproduce the current use removal form at any time. Through an automated workflow process, the user shall be able to forward the electronic removal form for further processing to the Treasurer.		
362	3	Assessor	Current Use Assessments - Removals	Tracking current use removals through market value assessments	The Application shall have an automated mechanism that assures that all properties (or portions of properties) removed from the current use assessment program are revalued at full market value for the applicable assessment year.		
359	2	Assessor	Current Use Assessments - Removals	Tracking estimates of compensatory tax for removals	The Application shall show that an estimate for compensatory tax was created. The user shall be able to view and/or reproduce the estimate at any time.		

8.5.11 Board of Equalization

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
526	3	BOE	Board of Equalization	Petition Tracking	The Application shall include a Board of Equalization petition tracking module. This module shall be interfaced with the Assessor's application.		

8.5.12 Value Appeal Response and Call Tracking

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
229	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls - Comps	The Application shall provide an automatic comparable sale comparison feature with appraiser manual override capability resulting in Board-ready comparable sale report listing sales and value adjustments to sales and final adjusted sale price for each comparable. Prior to running the comparable sale report, the user shall be given the opportunity to input a monthly trend factor for time which is applied to the sales selected for the sale report.		
865	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls - Comps	The Application shall provide a comparable sales search tool that enable users to search for comparable sales within a user defined radius from the subject. (E.g. .25 mile, 1 mile, 3 miles etc....)		
364	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals and Calls module shall store and display all value changes to the certified assessed value. (Note: value changes usually occur as a result of a review process).		
363	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals and Call Tracking module shall store and display a parcel's certified assessed value for the year selected by the user and shall also store and display any newly published values that are not yet certified but have been mailed to the property owner. (Generally, it is the newly published value that has prompted the appeal or call to the Assessor's office.)		
358	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeal and Call Tracking Module shall identify and link related parcels. For example, this would be used for an apartment complex consisting of four parcels with two buildings on each parcel.		
366	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals & Calls Module shall incorporate a workflow processing intelligence so that parcels flagged for review can be assigned to an appraiser, a specified work group; can be reassigned to different appraisers; all workflow has an audit trail.		
367	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals & Calls Module shall provide date & time stamped comment fields.		
350	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals and Call Tracker Module shall have an autofill function (i.e. fields in the module are automatically populated with stored data thus reducing data entry) In note section, Indicate level of programming needed to incorporate autofill feature for each of the following: BOE (Board of Equalization) Information: petition numbers, hearing dates etc.. Geocode Situs 1st Line Legal Building Characteristics Building Values Land Values Add On Values		
349	2	Assessor	Value Appeal Response and	Appeals & Calls	The Appeals and Call tracking Module shall		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			Call Tracking	Module - Real/Personal	interface and exchange data with outside third-party software programs--specifically data entered at the local Board of Equalization seamlessly and automatically transfers to the Appeals and Call Tracking module.		
348	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Application shall have an internal Appeals and Call Tracking Module that lets staff record and track incoming customer inquiries, appeals filed at the local (BOE) and appeals filed at the state level (BTA).		
365	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals & Calls Module shall enable an authorized user to create, store custom letters.		
371	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals & Calls Module shall store entries by Assessment Year, so notes and work for one assessment year are kept separate from the next assessment year.		
370	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals and Calls Module shall store, display and print all forms, letters, comparable sale grids and any other documentation sent to a property owner.		
368	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Real/Personal	The Appeals & Calls Module shall allow users to assign a status to each appeal or call. (Status examples include: initial call needed; more research needed; BOE ready; etc.)		
871	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Response Tracking	In response to inquiries or appeals, staff sends various letters to property owners that require the owner's signature. The signed letters are then returned to the Assessor's office. The Application shall interface with a County imaging system in such a way that scanned documents are associated with the correct property account number.		
870	2	Assessor	Value Appeal Response and Call Tracking	Appeals & Calls Module - Response Tracking & Attachments	In response to inquiries or appeals, staff sends various letters to property owners that require the owner's signature. The signed letters are then returned to the Assessor's office. The Application shall provide fields that allow users to record and track the owner's response to letters referenced above. (e.g. Yes, No, Agree, Disagree, Continue to BOE etc...)		
869	2	Assessor	Value Appeal Response and Call Tracking	Value Appeal and Response - completing standard forms and letters - Real/Personal	The Application shall give users access to all values and allows the user to determine which values are used to populate standard forms and letters.		
868	2	Assessor	Value Appeal Response and Call Tracking	Value Appeal Response and Call Tracking Reports - Real/Personal	The Application shall generate reports that allow management to assign work and monitor work status.		

## 8.6 TAX COLLECTION

The Application shall allow for fully integrated receipting activity between a Point of Sale Application, Lockbox, Web, IVR, and electronic files. Clark County desires to implement an application which will aid in collection of delinquent accounts to include making all information relating to collection activity available to our customer service representatives.

8.6.1 Receipting

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
236	3	Treasurer	Tax Collection - Receipting	Electronic payment due file for mortgage companies	The Application shall allow for data files of payments due to be available to mortgage companies through an FTP upload or similar. (Currently, this data is refreshed weekly.)		
881	3	Treasurer	Tax Collection - Receipting	Mortgage Reference Information	The Application shall receive mortgage company reference information electronically en masse. The mortgage information shall be identified within the Application by name. For example, if Washington Mutual defines which accounts they will make payment on, this information-Washington Mutual-will be spelled out and displayed with the account. Assessments will be defined separately from taxes.		
811	3	Treasurer	Tax Collection - Receipting	Receipting	A report shall be generated which shall document exception payments placed on account with a payment that does not match what is owing. For example, should a current year 1st half tax bill be owing \$350.00, however the payment received is \$325.00, the payment shall be noted as an exception. The Application shall have the ability to apply the payment after review from on-account to the tax bill. This report will be available for all receipting functions from Loans, remittance, POS and or third party file.		
814	3	Treasurer	Tax Collection - Receipting	Receipting	The Application shall produce an exception report which documents all accounts that do not match what was received vs. what is owed. This report shall also document what is within the County tolerance level for over and short.		
822	3	Treasurer	Tax Collection - Receipting	Receipting	When payments are processed at the remittance center, this equipment creates a unique receipt number for each transaction. The Application shall be able to accept this receipt number and date of transaction, and attach this information to the transaction at the time it is posted.		
1022	3	Treasurer	Tax Collection - Receipting	Receipting	The application shall allow the County to reserve the right to utilize an over and short tolerance, which treats the bill as if it were paid in full.		
810	3	Treasurer	Tax Collection - Receipting	Receipting - Loans	When a file is received, the Application shall post the payments in an on-account status. This process shall allow for an unlimited number of receipts processed in a day.		
812	3	Treasurer	Tax Collection - Receipting	Receipting - Loans	Payments shall be accepted via ACH. The payment shall be receipted via Oracle Accounts Receivable with the data file received by the taxation Application. The taxation Application shall have a process to accommodate reconciliation of the two applications, and the files received by each.		
821	3	Treasurer	Tax Collection - Receipting	Receipting - Remittance	The Application shall be able to receive a file from a remittance processing system. The Application shall be able to pull payment files from the remittance network in an automated fashion, and load it into the taxation Application residing on the County network.		
825	3	Treasurer	Tax Collection - Receipting	Receipting - Remittance	The Application shall track all property accounts which opt out of ARC processing. This information shall be used in conjunction with the remittance processing system to accommodate the customer's desires.		
1023	3	Treasurer	Tax Collection - Receipting	Receipting - Remittance	The taxation Application shall create a file containing accounts which have been paid in full, or if it is prior to May 15, 1st half taxes have been		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					paid. This file shall be transferred daily from the County network to the remittance network. This transfer shall occur in a automated fashion.		
818	3	Treasurer	Tax Collection - Receipting	Receipting - Third Party file	Payments shall be accepted via ACH. The payment shall be receipted via Oracle Accounts Receivable, with the data file received by the taxation Application. The taxation Application shall have a process to accommodate reconciliation of the two applications, and the files received by each.		
820	3	Treasurer	Tax Collection - Receipting	Receipting - Third Party file	When a file is received from a third party, the payments shall be posted in an on-account status. This process shall allow for an unlimited number of receipts to be processed in a day.		
242	3	Treasurer	Tax Collection - Receipting	Stores receipt number against posting	The Application shall retain and associate the receipt number(s) and receipt date assigned by the cashiering Application. The cashiering Application may be Point of Sale, Remittance Processing, or loan payment files. The Application shall be able to associate receipt numbers for any other type of receipting activity which may occur today, or in the future. The timing of these postings to the Application shall be controlled manually, and shall be posted in a batch mode.		
957	3	Treasurer	Tax Collection - Receipting	Tax Collection - Receipting	The Application shall receipt an unlimited number of payments at any given time, including real property payments, supplemental taxes, and or assessments. At the same time, create an exception report for the payments that cannot be applied to an account. This process will allow Clark County to review the exception payment, and either apply the payment to the account, or refund the payment back to the appropriate party.		
959	3	Treasurer	Tax Collection - Receipting	Tax Collection - Receipting	The Application shall allow all payment files to be exported in the following formats: Text file, tab, delimited, mdb, dbf, or xml.		
955	3	Treasurer	Tax Collection - Receipting	Tax Collection Receipting	The Application shall t create bulk refunds (example mortgage company payments) with detail of why the payment was being returned, including the account number, the check number, and where the check is being returned. This information shall be retained in the Application for customer service review with the information transferred to Oracle Accounts Payable for actual creation of the refund.		
1008	3	Treasurer	Tax Collection - Receipting	Tax Collection Receipting	The Application shall be able to unapply payments that are placed on account that have been received from an external receipting application and maintain an appropriate audit trail.		
1013	3	Treasurer	Tax Collection - Receipting	Tax Collection Receipting	The Application shall transfer refund information to Oracle Accounts Payable to include the following fields: a) Property Account Number b) Owner Name c) Address d) Amount of Refund e) Reason for Refund		
1004	3	Treasurer	Tax Collection - Receipting	Tax Collection- Receipting	The Application shall accomodate the County tolerance for over/short to the property tax account and GL.		

## 8.6.2 Collections

### 8.6.2.1 Distraint

Distraint rules are described in RCW 84.56.070 and .090.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
847	3	Treasurer	Collections - Distraint	Collections - Distraint	When an account moves through the distraint process, particular events create fees. The Application shall associate fees with designated accounts based upon steps in the distraint process. Fees shall be added automatically to the collection Application and documented.		
983	2	Treasurer	Collections - Distraint	Collections - Distraint	The Application collection tool shall automatically document collection activity associated with the distraint process.		
985	2	Treasurer	Collections - Distraint	Collections - Distraint	The Application shall provide an automated queuing feature (established with criteria set internally) which prioritizes accounts needing additional review.		
987	3	Treasurer	Collections - Distraint	Collections - Distraint	The Application shall have the ability to identify properties meeting the definition of distraint.		
840	2	Treasurer	Collections - Distraint	Collections - Personal Property Distraint	The Application shall auto-generate letters based upon defined dates. The letters shall be based upon predefined criteria associated with each account affected. This action shall be documented within the collection Application.		

### 8.6.2.2 Foreclosure

After the expiration of three years from the date of delinquency, when any property remains on the tax rolls for which no certificate of delinquency has been issued, the County Treasurer shall proceed to issue certificates of delinquency on the property to the County for all years' taxes, interest, penalties and costs (per RCW 84.64.050).

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
667	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application and any associated collection tool shall have the ability to maintain all pertinent information, such as persons with a recorded interest in the property, whether a title search has been completed, or statutorily required mailings have been sent, are associated with the foreclosure properties.		
669	3	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application and any associated collection tool shall have the ability to identify all potential properties meeting the foreclosure definition, and flag this information into the customer information tool.		
732	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application and any associated collection tool shall have the ability to track the number of mailings (both regular and certified), and shall provide a mechanism to enter the tracking number associated with each certified mailing.		
733	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application shall use a general note screen for contact, payment, or general information associated with the property. The Application shall also have a general note screen that shall be used by all Customer Service Representatives.		
734	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application collection tool shall have the ability to provide a daily call back or task list for those items that have not been worked to conclusion, or require additional follow-up at a later date.		
735	3	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application shall associate foreclosure fees with specific account numbers defined as being in the foreclosure process. The Application shall be		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					able to accomplish this for a single item, a group, or en masse.		
736	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application shall allow adding any person (and their contact information) who has a recorded interest in or a lien of record upon the property.		
738	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application shall contain forms/templates that are necessary in the foreclosure process. Examples include, but not limited to: Correspondence letters, certificate of delinquency, summons and notice letters, bidder's registration forms, bidder cards, agency assignment letters, Treasurer's Receipts, etc., and where appropriate, assign signatures to letters. These forms/templates shall be maintainable by appropriate staff.		
739	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	When needed, the Application shall enable personnel to do mail merge letters from this tool, and request the property owner's statements that are associated with each property. The Application shall have the flexibility to print these items in a collated manner, and produce address labels if needed.		
1114	2	Treasurer	Collections - Foreclosure	Collections - Foreclosure	The Application shall track all sales proceeds until appropriately disbursed.		
737	3	Treasurer	Collections - Foreclosure	Report	The Application shall have the ability to provide on-screen or downloadable reports defined by the user. The Application shall have reports showing the foreclosure properties, the activities and status of such properties, fees that have been added to the account, and comments associated with collections or customer service efforts.		

**8.6.2.3 Miscellaneous-third party assignment, bankruptcy, etc.**

Clark County utilizes an outside source for collection of delinquent assessments and fees. The forwarding of accounts occurs after Clark County has met all Fair Debt and Credit Act requirements. Bankruptcy account information is forwarded to the Treasurer’s Office regarding property tax, assessment and fee accounts. Federal Bankruptcy rules must be adhered to regarding collection activity.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Able to process Chapter 13 bankruptcy payments	The Application shall process partial payments from the Chapter 13 trustee. The Application shall associate the partial payment to the property detailed by the trustee's office. Funds shall be held on-account.		
237	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Assign lighting assessment to collection agency	Lighting assessments can be assigned to a specific collection agency. The property account is then flagged as an in Collections Status.		
4	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Bankruptcy flag	The Application shall provide for a bankruptcy flag preventing various statements and documents from being generated, such as batch tax statements, collection or delinquent letters, and other communications.		
1115	2	Treasurer	Collections - Miscellaneous third-party	Collections	The Application shall track all garnishments that have been documented and provided to the Treasurer's Office by an outside party or other		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			assignment, bankruptcy, etc.		County Department.		
711	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall update a flag, or have an indicator for accounts where a taxpayer files for bankruptcy protection.		
743	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall have a report to list accounts in bankruptcy, and associate information relative to the bankruptcy such as filing date, chapter, status of bankruptcy, court documentation, etc..		
744	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall have a means to notify an outside collection agency when an account has been updated with a bankruptcy flag. This indicates that the collection efforts must be discontinued.		
745	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	For properties where the taxpayer files for bankruptcy protection, the Application shall update the collection module, either internal to the Taxation Application, or the County's collections application, for an account with a bankruptcy flag.		
764	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall accept the addition of various fees to be associated with a property, or allocated to many properties. These fees include, but are not limited to: Foreclosure fees, collection fees, and lien fees.		
771	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall have a report indicating all payment information made to accounts in bankruptcy.		
831	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall produce collection letters.		
833	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall produce correspondence letters.		
834	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall provide a means to document notes and taxpayer comments. This information shall be retained as part of the audit trail.		
835	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall provide a method to assign delinquent accounts to an outside collection agency for collection. This shall be completed on a user level, who has the approved security for these type of transactions.		
836	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous-third party assignment, bankruptcy, etc.	The Application shall provide a means for adding additional fees or costs to delinquent accounts. The Application shall provide a method for these additional costs to be allocated to a single account, or to all accounts. This shall be accomplished for one item, a group, or en masse.		
837	2	Treasurer	Collections - Miscellaneous	Collections - Miscellaneous-	The Application shall provide a method to track		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
			third-party assignment, bankruptcy, etc.	third party assignment, bankruptcy, etc.	delinquent accounts.		
839	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections - Miscellaneous- third party assignment, bankruptcy, etc.	The Application shall provide a method for indicating the payment status of delinquent accounts. Payments may be from either a single payment, or from a payment file submitted by an outside collection agency.		
838	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Collections status accounts	The Application shall provide a method to update the status of delinquent accounts.		
5	2	Treasurer	Collections - Miscellaneous third-party assignment, bankruptcy, etc.	Track bankruptcy, mortgage and user-defined codes	The Application shall allow the user to track and report on properties with a bankruptcy code, mortgage code, and user-defined codes this shall include a code specific to assigning an account to collections. Clark County set-up shall assign priority levels for these codes.		

**8.6.3 Paid Under Protest**

As stated in RCW 84.68.020, should any property account owner find that the levy of taxes associated with that property be excessive may pay these taxes under protest. This action requires written documentation from the property account owner as to the properties in questions and the grounds for such protest. The owner of record then has the right to take action in Superior Court or Federal Court.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
553	2	Both Assessor and Treasurer	Paid Under Protest	Paid Under Protest	The Application shall image the paid under protest letter from the taxpayer, and associate it to the property and tax year.		
712	2	Both Assessor and Treasurer	Paid Under Protest	Paid Under Protest	The paid under protest letter image is associated with each property listed in the protest letter. In order to accomplish the foregoing, the Application, if necessary, shall interface with other systems/applications.		
913	3	Both Assessor and Treasurer	Paid Under Protest	Reporting	The Application shall report all paid under protest accounts. This report shall contain the name on the account, property account number, and tax year.		

**8.6.4 Advance Taxes**

Per RCW 58.08.040, prior to the recording of a plat subsequent to May 31st in any year and prior to the actual collection date of real property taxes a deposit shall be collected by the Treasurer. The deposit shall equal the product of the County Assessor’s latest valuation on the property, less improvements in such subdivision, multiplied by the current year’s levy rate, increased by twenty five percent. A receipt shall be issued which becomes evidence of the payment.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
566	3	Treasurer	Advance Taxes - Real Property	Advance taxes - Real Property	The Application shall calculate the amount required for the Deposit of advance taxes. The formula is: The current assessed value, less improvements, multiplied by 125% of the current		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					year's levy rate.		
570	3	Treasurer	Advance Taxes - Real Property	Advance Taxes - Real Property	The Application shall document the payment placed on account for the advance taxes for the property. Documentation shall consist of a minimum of who paid, payment date, the advance tax year, and the receipt number.		
747	3	Treasurer	Advance Taxes - Real Property	Advance Taxes - Real Property	The Application, in the following year, shall apply the on account payment to the property account number, billing for the current year, and generate a refund for the amount of the overage on this account. This shall be available for a single item, a group, or en masse.		
748	3	Treasurer	Advance Taxes - Real Property	Advance Taxes - Real Property	The Application shall provide a report of all the advance taxes where a deposit has been placed on account.		
948	3	Treasurer	Advance Taxes - Real Property	Advance Taxes - Real Property	The Application shall have a status for each account as "on -account" to allow payments to be applied to the tax account without associating to a tax or assesment billing..		
950	3	Treasurer	Advance Taxes - Real Property	Advance Taxes - Real Property	The Application shall create a certificate of taxes paid letter after payment of advance taxes has been received.		
951	3	Treasurer	Advance Taxes - Real Property	Advance Taxes - Real Property	The Application shall allow "on-account" payments to be applied in mass.		
1070	3	Both Assessor and Treasurer	Advance Taxes - Real Property	Certify taxes paid	The Application shall freeze/flag values, (not allowing for any value changes that will affect taxes to occur) at the time advanced taxes have been received and placed on account.		
749	3	Treasurer	Advance Taxes - Real Property	Report	The Application shall generate a report after the process of posting the advance taxes in the new year, which shall show payments placed on account have been applied to the account, and any remaining amount to be refunded. This report shall be defined by year.		

**8.6.5 Current Use Removals**

Landowners may request that their property be put into one of several categories of Current Use and taxed at lower than market value. These include Farm and Agricultural, Timber, and Open Space in accordance with RCW 84.34. The Assessors Office determines that a property qualifies for a special program, and makes the value adjustment to assess taxes at the lower rate.

Parcels can be removed at the owner’s request, when the property no longer qualifies, when a change in use results in disqualification, exempt owner, or when the Notice of Continuance is not signed. At this time the taxes for the difference between market value and current use value for the last 7 years are due along with interest at 1% per month and, if there has been a change in use, a 20% penalty on the tax and interest. Recording fees are assessed and tax is calculated for the remainder of the current year.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
775	3	Treasurer	Tax Collection - Current Use Removals	Current Use Removal	When the Assessor's Office removes an account from current use, the Application shall automatically generate a statement for the		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					customer to pay. This statement shall detail the reason for its creation (removal from current use program), as well as: Itemized prior year's taxes interest on prior year's taxes penalty on prior year's taxes recording and filing fees remainder of current year's taxes		
777	3	Treasurer	Tax Collection - Current Use Removals	Current Use Removal	Upon receipt of payment, the Assessor's Office shall be able to review information online to this affect, and move forward with release of lien.		
778	3	Treasurer	Tax Collection - Current Use Removals	Current Use Removal	The Application shall include current use removal fees, to include delinquencies, with the mass generation of property tax statements, as well as being able to generate and include this information on property tax statements generated in-house.		
779	3	Treasurer	Tax Collection - Current Use Removals	Current Use Removal	The Application shall be able to track delinquent current use removal fees, and include this information in the foreclosure process, should the delinquency meet the criteria established for foreclosure.		
562	3	Both Assessor and Treasurer	Tax Collection - Current Use Removals	Tax Collection - Real Property and Current Use	The Application shall allow for landowners that request that their property be put into one of several categories of Current Use, and taxed at lower than market rate. Parcels can be removed at the owner's request, when the property no longer qualifies, when a change in use results in disqualification, exempt owner, or when the Notice of Continuance is not signed. At this time, the taxes for the difference between market value and current use value for the last 10 years (this shall be a variable field), are due along with penalty and interest.		
725	3	Treasurer	Tax Collection - Current Use Removals	Tax Collection - Real Property and Current Use	The Application shall allow for, upon receipt of payment, distribution to occur as follows: 1) Prior year's taxes, using the levy rates for the prior year 2) Interest and penalty to the general fund 3) Recording and filing fees as required		
772	3	Treasurer	Tax Collection - Current Use Removals	Tax Collection - Real Property and Current Use	The Application shall distribute current use taxes using the same levy rates as other property accounts in the code area.		
773	3	Treasurer	Tax Collection - Current Use Removals	Tax Collection - Real Property and Current Use	The Application shall generate property tax statements for accounts in current use in the same manner that other real property tax statements are generated. This shall include the mass generation of statements created twice yearly.		
774	3	Treasurer	Tax Collection - Current Use Removals	Tax Collection - Real Property and Current Use	The Application shall track an account in current use for its delinquent status to include the calculation of delinquent interest (see Interest and Penalty table).		

8.6.6 Payments in Lieu of (Timber harvest, etc)

Clark County receives revenues that are required to be distributed to the County and the rest of the taxing districts based upon the same allocation formulas as property taxes given the location where the revenue was derived.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
563	3	Treasurer	Tax Collection - Payments in Lieu of (Timber harvest, etc)	Tax Collection - Payments in Lieu of (Timber harvest, etc)	Payment in Lieu of taxes (PILOT) includes the following: DNR Timber, DNR Purchase, DNR Other, Private Harvest Timber Land, Federal Entitlement Land, Housing Authority PILOT, and Federal PILOT. The user shall be able to change,		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					update and maintain the tax code formulas, without programmer intervention, for the calculation of the revenue distribution.		
565	3	Treasurer	Tax Collection - Payments in Lieu of (Timber harvest, etc)	Tax Collection - Payments in Lieu of (Timber harvest, etc)	The Application shall create a file (see interface specifications) to be loaded to the County's General Ledger, for the distribution of revenue from these payments.		

8.6.7 Refunds

The Clark County Treasurer’s Office processes several distinct forms of refunds:

- Cashier refunds – those associated with transactions received by a general cashier
- Remittance refunds – those associated with transactions processed through remittance equipment
- Loan refunds – those associated with transactions processed from bulk mortgage and tax service agencies and petition refunds-those associated with a tax status change or a value adjustment.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
579	3	Treasurer	Refunds	Petition Refunds	The Application shall have an interest table so that interest for prior years is calculated correctly. This table shall contain both current and prior year interest rates. The interest rates shall be modifiable by appropriate personnel (See Interest and penalty table)		
559	3	Treasurer	Refunds	Refunds	The Application shall provide report(s) for the refunds of the day, which shall contain the corresponding details necessary for support documentation.		
580	3	Treasurer	Refunds	Refunds	The Application shall retain all refund information so that customer service representatives have ready access to this information.		
581	3	Treasurer	Refunds	Refunds	The Application shall track the status of the refund process including, but not limited to: Processed for payment, pending documentation, in accounts payable, refund mailed, etc.		
665	3	Treasurer	Refunds	Refunds	The Application shall create a refund file that shall be loaded into Oracle Accounts Payable		
760	3	Treasurer	Refunds	Refunds	The Application shall accommodate various refund types. The refund type is the source of the refund, for example: The cashiers, remittance processor, loan/mortgage companies, and taxpayer petitions.		
761	3	Treasurer	Refunds	Refunds	The Application shall print or calendar (save) the refund letter(s) for printing at a later date, in order to coincide with when the refund check is created and available for mailing to the taxpayer.		
965	3	Treasurer	Refunds	Refunds	The Application shall generate a letter detailing the type of refund and reason for the refund. This letter shall contain specific information relating to property accounts being refunded.		

8.6.8 Mobile Home Movement Permits

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
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ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1109	2	Treasurer	Mobile Home Movement Permits	Mobile Home Movement Permits	The Application shall be able to process mobile home movement permits, process advance taxes for a mobile home, issue proof of taxes paid letter and accommodate all requirements associated with the mobile home remaining in the County, moving out of the County or out of the state.		

## 8.7 TAX ACCOUNTING

The ATS System shall provide seamless interface with an Oracle Financial System which produces the financial reports for the County and its districts. The ATS system will need to be flexible enough to allow the users to meet the reporting needs of the assessment and taxing districts instead of having the users manipulate the data in the system to meet those needs.

The ATS system will provide detailed and summary reports within a specified date range that will aid in balancing the POS System to the Oracle Financial System and also provide detailed tax and assessment reports for each fund that has levies or assessments.

The ATS shall provide accounting to the Oracle Financials General Ledger for revenues and receivables at the time of levy certification and to provide accounting for receipts as well as cash and receivables. All adjustments should also be accounted for as an adjusting entry to revenues and receivables.

### 8.7.1 Distribution

Distribution is a process that distributes property taxes and assessments to property accounts on CATS, as well as posts accounting transactions to the County and its junior taxing districts funds within the Oracle GL.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
3	3	Treasurer	Tax Accounting - Distribution	Account detail transfer to Oracle General Ledger	Account details shall be transferred by the Application to Oracle General Ledger by day, in detail--not as a summary.		
1074	3	Treasurer	Tax Accounting - Distribution	Distribution	At the time of distribution of property tax receipts, the amount collected may differ from what is distributed due to rounding issues associated with the levy rates used for distribution. The Application shall account for such rounding issues, and allocate such funds to a specific account code.		
714	3	Treasurer	Tax Accounting - Distribution	Finance - Distribution	The Application shall provide each cashier's receipts by type (i.e., real property, personal property, interest, penalty, etc.)		
716	3	Treasurer	Tax Accounting - Distribution	Finance - Distribution	The Application shall provide a daily list of entries to Oracle General Ledger.		
717	3	Treasurer	Tax Accounting - Distribution	Finance - Distribution	The Application shall provide a daily list of distributions to each code area.		
718	3	Treasurer	Tax Accounting - Distribution	Finance - Distribution	The Application shall provide a daily list of distributions to each Fund by levy year.		
1052	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Balancing	All Receipts Listing (summarizes all cashiers' work of the day and totals all property tax receipts)		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					for the day)		
1025	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Real Property Listing (lists Real Property Tax, Excise Tax, Interest on each, Lien Fees, Over/Short amounts for the day).		
1058	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Personal Property Listing (Personal Property Taxes, Interest, Lien Fees, Over/Short amounts for the day)		
1059	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Local Improvement District Transactions (lists LID, Interest, Lien Fees, Over/Short amounts for the day)		
1060	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Distribution by Code Area (lists totals received in each code area, and distributes the receipts by fund)		
1061	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Distribution by Code Area (lists totals received in each code district by year the taxes were due in, including interest and penalty)		
1062	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Treasurer Real/Personal/Excise Receipts Treasurer's Receipt Offline Proof (summary of tax receipts by fund for distribution to the General Ledger)		
1064	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Distribution of Excise Taxes (summary of excise taxes distributed by fund)		
1065	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Listing of assessments by type with full accounting code listing.		
1066	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Full accounting journal for assessments as interfaced to Oracle GL with balancing totals		
1067	3	Treasurer	Tax Accounting - Distribution	Reports - Daily Distribution	Local Improvement Offsets Treasurer's Receipt Offline Proof (lists distribution of CWP, RID etc., by fund)		
884	3	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution	The Application shall distribute property taxes to taxing districts based upon percentage of levy rate calculation for specific taxing districts which the property account lays.		
885	3	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution	The Application shall distribute property tax payments daily in a batch process.		
944	3	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution	The Application shall allow for the ability to reconcile cash receipts to tax code areas.		
966	3	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution	The Application shall be able to reconcile cash receipts to each fund that has received distributions.		
887	3	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution Reports	The Application shall allow reports to be regenerated after an accounting period is closed.		
1121	2	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution Reports	The Application shall allow for reports to balance receipts posted to accounting entries to be loaded into Oracle FMS General Ledger.		
886	3	Treasurer	Tax Accounting - Distribution	Tax Accounting - Distribution Reports	The Application shall contain reports to balance receipts posted to overall accounts updated in the database.		

### 8.7.2 Tax Roll

Tax Roll is the accounts receivable of all of the property taxes by fund by levy year. The certified tax levy for a jurisdiction creates the property tax receivable for the given levy year. The amounts due are calculated by the assessed value times the levy

rate and are posted to the current year. The County is required to track these receivables by GASB 34 for 10 years. The tax roll is separated by the current year and 5 delinquent years. The oldest delinquent year is made up of all of the remaining delinquent years. Throughout the year, payments are made to the individual parcels, consequently adjusting the accounts receivables. In addition cancellation and/or supplements are applied to the parcels. There are also annexations which occur periodically throughout the year and these changes need to be reflected in the Tax Roll (Accounts Receivables).

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1089	3	Both Assessor and Treasurer	Tax Accounting - Tax Roll	Adjudicated Refunds	The Application shall distribute and account for Adjudicated Refunds as prescribed in RCW 84.68		
1088	3	Both Assessor and Treasurer	Tax Accounting - Tax Roll	Administrative Refunds	The Application shall distribute and account for Administrative Refunds as prescribed in RCW 84.69.		
1068	3	Treasurer	Tax Accounting - Tax Roll	Reports - Mid-month and Month End	Month to Date Code Area Report (lists receipts for the period, by code area, by year, by Regular Tax, Fire Patrol, LF Penalty, Penalty, Interest)		
1069	3	Treasurer	Tax Accounting - Tax Roll	Reports - Mid-month and Month End	Distribution of Excise Taxes (month end only) (summary of excise taxes, distributed by fund)		
1026	3	Treasurer	Tax Accounting - Tax Roll	Reports - Mid-Month and Month-End	Distribution Tax Roll (lists tax receipts for the period, by fund, by year)		
927	3	Treasurer	Tax Accounting - Tax Roll	Tax Accounting - Tax Roll	The Application shall be able to generate web-ready reports.		
928	3	Treasurer	Tax Accounting - Tax Roll	Tax Accounting - Tax Roll Reports	The Application shall produce a report to reconcile the Tax Roll to the Taxation Database.		
939	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	The Application shall track property tax receivables for a specified number of years. The number of years to be tracked should be a variable field, configurable by the appropriate County staff member.		
940	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	The Tax Roll is separated by the current year and 9 delinquent years. The Application shall use the 9th delinquent year as the year to which all prior delinquent years are rolled.		
941	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	As changes are made within the Application for annexations, cancellations, supplements, combinations, or segregations, the changes to the receivables shall be reflected in Tax Roll. The changes shall occur in Tax roll in batch mode.		
942	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	The Application shall create tax roll in fund order.		
943	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	When the tax payment and/or cancellation supplement occurs, the Application shall make the necessary posting that shall occur to both the Tax Roll and the Taxation database simultaneously. This shall be seamless, and shall provide daily adjustments to the Tax roll based upon activity.		
962	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	At the beginning of every month, reports shall be generated to confirm that the tax rolls balance to the Taxation database. The reports shall be a bimonthly summary, consisting of all Real & Personal Property taxes paid, and any cancellation/supplements, and any annexation adjustments by both code areas and by funds, and to tie back to the daily activity. The reports shall		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					allow for drill down capabilities to the source transaction level as well any scanned images.		
963	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	The Cancellation/Supplement report shall list all of the parcels being adjusted within the code areas. These reports are needed to confirm that the ending balances of the tax roll database and the property tax database are the same.		
964	3	Treasurer	Tax Accounting - Tax Roll	Tax Roll	Mid-month tax roll and end of the month tax roll reports shall be generated in order to assist with the daily distribution. These reports shall be capable of being viewed on-line daily with drill down capabilities to the source transaction level as well any scanned images.		

8.7.3 Tax Remittance

Clark County remits property tax collections directly to certain taxing districts either on a daily basis, semi-monthly, or monthly basis.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
946	2	Treasurer	Tax Accounting - Tax Remittance	Tax Accounting - Tax Remittance Reports	The Application shall generate a report which compiles monthly amounts due to the cities.		
554	3	Treasurer	Tax Accounting - Tax Remittance	Tax Remittances	The Application shall track periodic receipts of property tax collections to taxing districts.		
713	3	Treasurer	Tax Accounting - Tax Remittance	Tax Remittances	The Application shall create an export file for Oracle Accounts Payable, which shall allow the County to electronically remit these periodic tax funds.		

8.7.4 Accounting and Maintaining Property Tax Receivables

Once property taxes have been created in certification, the dollars associated shall be generated to load such receivables into Oracle Financials to account for the property tax receivable for the new levy year for County and taxing district funds.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
561	3	Treasurer	Tax Accounting - Accounting and Maintaining Property Tax Receivables	Accounting and Maintaining Property tax receivables	Once property taxes have been created in certification, the Application shall generate a file to load the accounting entries into Oracle General Ledger to account for the property tax receivable for the new levy year for County taxing district funds. Similar entries must be made when a cancelation or supplment occurs.		
720	3	Treasurer	Tax Accounting - Accounting and Maintaining Property Tax Receivables	Accounting and Maintaining Property tax receivables	This file shall contain the account coding for both the receivable and the revenue accounts.		
721	3	Treasurer	Tax Accounting - Accounting and Maintaining Property Tax Receivables	Accounting and Maintaining Property tax receivables	As property taxes are paid or modified, the Application shall post the receipts and cancellation/supplements to the General Ledger daily. The Application shall transfer to Oracle General Ledger at a summary level by fund, based upon the date of the transaction. See the table for sample accounting entries.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
722	3	Treasurer	Tax Accounting - Accounting and Maintaining Property Tax Receivables	Accounting and Maintaining Property tax receivables	The Application shall allow reporting of accounting entries prior to posting to Oracle Accounts Receivables to ensure accuracy. The ability to print this file shall be available prior to downloading to Accounts Receivables.		
889	3	Treasurer	Tax Accounting - Accounting and Maintaining Property Tax Receivables	ax Accounting - Accounting and Maintaining Property Tax Receivables	The Application shall update and cross validate the General Ledger account codes from the County's Oracle General Ledger.		

**Questions**

891	Describe how the Application generates accounting transactions.
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**8.7.5 Accounts Receivables for Fees and Assessments**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
243	3	Treasurer	Tax Accounting - Accounts Receivables for Fees and Assessments	Accounts Receivables for Fees and Assessments	Receipts shall be recorded to the General Ledger with assessment principal, delinquent interest and penalty.		
723	3	Treasurer	Tax Accounting - Accounts Receivables for Fees and Assessments	Accounts Receivables for Fees and Assessments	Once fees and assessment rolls are created, the Application shall create a file to load into the General Ledger that accounts for the assessment receivables for the new levy year. This file shall include account coding for both the receivable and the revenue.		
888	3	Treasurer	Tax Accounting - Accounts Receivables for Fees and Assessments	Tax Accounting - Accounts Receivables for Fees and Assessments	The Application shall update and cross validate the General Ledger account codes from the County's Oracle General Ledger.		

**8.7.6 Overlapping Debt**

Overlapping debt occurs when the same parcel is servicing the debt of multiple districts.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
557	2	Treasurer	Tax Accounting - Overlapping Debt	Finance - Overlapping Debt	The Application shall report the total property assessment value within each district that it has identified as an overlapping district, along with the percentage of each overlapping district property that lies within the specified district that is being looked at. The report takes the outstanding debt for each district and multiplies it by the percent of property value within that district.		
558	2	Treasurer	Tax Accounting - Overlapping Debt	Finance - Overlapping Debt	The Application shall produce an Underwriter's Report. The report shall show millage rates for all levies within this fund's specific district, for each year that lies within a specified time frame. This report shall also contain the amount levied for a specific year within the given date range, the adjustments to each levy, along with the collected		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					amount for the levy, for each year, within that specified date range and the balance remaining.		

**8.8 GIS**

As described in the GIS Vision section, Clark County has a mature GIS system that is well integrated into the existing Assessment and Taxation system. It is anticipated that the new system will provide at least the same level of integration.

Clark County currently uses the ESRI product line for its GIS applications. The parcel data is stored in ArcSDE 9.0 and is published weekly in shapefile format.

Application level interaction between the CAMA and GIS provides the appraiser with the ability to select a parcel or parcels using a GIS viewer and automatically pass that selected set of records to the CAMA for further processing or analysis. Application integration should also allow the appraiser to pass the selected set of records from the CAMA system to a GIS viewer.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
485	3	GIS	Geographic Information System	Exporting sketches	The Application shall export the building sketch into an ESRI compatible vector format that includes the building ID.		
486	3	GIS	Geographic Information System	Geographic coordinates	The CAMA Application shall track geographic coordinates for the building location.		
491	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application shall allow authorized Clark County users to choose the symbology used in the map.		
496	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application's source code for the GIS Viewer shall be available to Clark County.		
495	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application shall support multiple years of ortho-photography.		
494	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application shall support ESRI shapefiles.		
493	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application shall support ESRI SDE layers.		
492	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application shall allow authorized Clark County users to choose the layers used in the map.		
488	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application shall include a GIS viewer.		
489	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application's included GIS Viewer shall be developed using ESRI software.		
490	3	GIS	Geographic Information System	GIS and CAMA application integration	The Application's GIS viewer shall operate on a field device with no LAN access.		
18	3	GIS	Geographic Information System	GIS Interface	The Application provides an interface between Clark County's existing ESRI GIS Application and the proposed CAMA Application. For example,		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					the interface can send the GIS Application a property account number, or the CAMA Application can receive a property account number from the GIS and display the CAMA record for that number.		
12	3	GIS	Geographic Information System	GIS interface documentation - Real/Personal	The Application shall include a well-documented database architecture and table structures that provide simple, secure access for GIS technicians.		
1119	3	GIS	Geographic Information System	Information exchange from GIS to the Application	The Application shall provide a mechanism for dynamically receiving a selected set of parcels and attributes from a GIS application.		
1118	3	GIS	Geographic Information System	Information exchange from the Application to GIS	The Application shall provide a mechanism for dynamically passing a selected set of parcels and attributes to a GIS application.		
17	3	GIS	Geographic Information System	Vector sketches	The first floor of the building sketches can be exported in an ESRI supported vector format for use as a building footprint layer in the GIS.		

## 8.9 SALES TRANSACTION MANAGEMENT

Clark County desires to integrate processes to create more efficiency within the areas of excise tax processing, distribution, sales analysis and record maintenance. Clark County desires to receive excise tax information electronically where the data is then stored in tables that are readily accessible to perform these processes.

### 8.9.1 Excise / Real Estate Excise Tax (REET)

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
1091	3	Treasurer	Real Estate Excise Tax	Excise Tax	The Application shall receive excise tax information electronically and import the data into the tax Application in an automated fashion.		
549	3	Treasurer	Real Estate Excise Tax	Real Estate and Mobile Home Excise Taxes	The Application shall provide for a configurable administrative fee that shall be distributed to multiple funds.		
550	3	Treasurer	Real Estate Excise Tax	Real Estate and Mobile Home Excise Taxes	The Application shall provide for excise tax rates that are configurable at an administrator level, and are table-driven.		
551	3	Treasurer	Real Estate Excise Tax	Real Estate and Mobile Home Excise Taxes	The Application shall provide a sequential excise number that is assigned for all transactions to be recorded with the Auditor's Office.		
708	3	Both Assessor and Treasurer	Real Estate Excise Tax	Real Estate Excise Tax	Real Estate Excise information shall be used to complete information relating to sales analysis, name and address changes, real estate excise tax distribution, and Land Records work processes. The information shall be stored in one place, with all parties using the same data to complete processes.		
709	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax	When Excise has been processed, the information shall update tables in a pending status until the appropriate review and approval has occurred.		
710	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax	The Application shall, if necessary, integrate with a third-party to accommodate electronic excise filing and processing.		
893	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax	The Application shall have a table to set REET rates and shall allow for additional rates as needed.		
894	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax	The Application shall track the rate to be collected by the rate effective date and allow for payments		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					to calculate based upon sales occurring within effective dates.		
1072	3	Treasurer	Real Estate Excise Tax	Report	The Application shall allow user to query defined parameters to create a Real Estate Excise Tax report. This information shall prefill a form or a template containing but not be limited to the following information from the query: date, beginning and ending affidavit numbers for a selected time frame, total of affidavits, number of affidavits that are for mobile homes, total state and local tax collected (excluding refunds, mobile home, penalties & interest. The users shall have the ability to add these amounts in later in the report)		
11123	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax Distribution	The Application shall distribute daily the collected real estate excise taxes. The tax is distributed based upon the following formulas: (State REET x Sales Price)- 1% administrative fee = A (City REET x Sales Price) – 1% administrative fee = B Total REET = A + B Or (State REET x Sales Price)- 1% administrative fee = A (County REET x Sales Price)- 1% administrative fee = C Then C/2 = D(County Capital) D/2 = E (County Parks) & F (County Economic Development) Total REET = A + C + D + E +F		
1124	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax Distribution	Upon entering the parcel, the ATS will draw from REET tax tables to calculate the REET owing. (The tables need to be able to retain history so that delinquent taxes can be collected and distributed appropriately.) The rates will be applied against the sales amount and calculated. The current rates are as follows: State of Washington 1.28% Clark County – Capital (unincorporated) .25% Clark County - Parks (unincorporated) .125% Clark County – Economic Development (unincorporated) .125% City of Vancouver 0.50% City of Camas 0.50% City of Washougal 0.50% City of Battleground 0.50% City of La Center 0.25% City of Ridgefield 0.50% Town of Yacolt 0.25% Town of Woodland 0.50% The formula for REET is: Sales Price x REET rate = Real Estate Excise Tax (REET)		
1125	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax Distribution	The ATS will distribute the REET based upon these formulas and code the result to the appropriate accounting codes to be interfaced with		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					Oracle Financials General Ledger.		
1126	3	Treasurer	Real Estate Excise Tax	Real Estate Excise Tax Distribution	The ATS shall provide daily summaries of the amount of REET distributed by reporting entity as well as detail reports. The same should occur monthly and annually.		

### 8.9.2 Sales Database

We consider the accuracy and reliability of the sales database crucial to the performance of the entire CAMA system. All transferred properties must be documented and captured, quantified, and qualified within this portion of the system.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
857	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Corrections	The Application shall allow a user to make corrections and updates to the sales module in batch. (This is particularly important once all new construction parcels have been identified as 100% complete. We would expect for this group of properties to complete a batch upload of all property characteristics and associated values)		
171	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Corrections	The Application shall allow users to correct any mistakes found in the information posted to the sales module. Corrections shall be able to be processed with a minimum amount of key strokes using a copy function when possible. Corrections of mistakes shall generate a time/date stamp from the user making the change (audit trail).		
390	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Corrections	If incorrect data is found in the information posted to sales history, the Application shall allow a user to manually correct the error in the active CAMA Application then automatically repost (update) the point of sale parcel characteristics in the sales module. (Note: this specification ID 390 deals with making the correction in the active database whereas specification ID 171 deals with making the correction in the sales module).		
98	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Exports	The Application shall allow sales records to be exported into other applications such as Access and in statistical software such as Excel, NCSS and SPSS.		
25	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - History of Sales	The Application shall maintain a sales history file with valuation capabilities that captures and freezes the property characteristics at the time of the sale, while supporting corrections (based on historical valuation tables) of property value and characteristics. The Application shall allow for manual edit of property characteristics in sales history file. The Application shall allow multiple occurrences of the same property in the sales file.		
97	1	Assessor	Appraisal Real Property - Sales Database	Sales Database - Housekeeping	The Application shall allow for systemic purging of sales records by date ranges.		
269	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - IOP's	The Application shall identify and link parcel data from multiple parcels which sold on one deed (IOP's).		
345	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - IOP's	In addition to providing an individual sale record for each sale parcel, the Application shall create a master sale record for each IOP transaction where parcels identified as IOP's shall be consolidated (summarized) into one set of land and building characteristics and assessed values shall be totaled		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					for ratio analysis and reporting.		
95	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Maintenance	The Application shall allow sales in the sales history file to be flagged for source, validity codes, sale type, property type, and instrument (deed type), and good/bad state codes for the inclusion or exclusion of sales data in studies and reports and for the Washington Department of Revenue Ratio Study. See Appendix H - CATS sales sub-system maintenance screen.		
99	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Manufactured Homes	The Application shall maintain a history of mobile home sales together with a list of real property accounts to which the sale MH has been attached. The mobile home sale record shall include fields for tracking the date the MH was placed on and removed from each real property account.		
102	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Modify Assessed Value	The Application shall allow recalculation of value at point of sale if subsequent to sale new information prompts appraiser to edit / correct sale record data to accurately reflect building or land data at point of sale.		
94	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Query Tool	The Application shall provide a user friendly ad-hoc query tool and report writing tool.		
101	2	Assessor	Appraisal Real Property - Sales Database	Sales Database - Reports	The application shall enable users to create custom sales verification form letters for each property type.		
93	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Tracking	For each sale transaction, the Application shall capture and store a complete copy of all data associated with the parcel (or parcels in the case of an IOP sale).		
344	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Tracking	The Application shall store all information found on each Real Estate Excise Tax Affidavit as part of the sale record. See Appendix G, Report Samples, Real Estate Excise Tax Affidavit Form		
100	3	Assessor	Appraisal Real Property - Sales Database	Sales Database - Verification Codes	As part of the sales qualification process, the Application shall allow the user to assign multiple sale verification codes to a property account number.		
346	2	Assessor	Appraisal Real Property - Sales Database	Sales Database - Viewer	Please respond for each of the graph types below. The application shall be able to graph sales output from user search criteria into: a) Bar graphs b) Histograms c) Line graphs d) Scatter diagrams		

### 8.9.3 Land Records Management

#### 8.9.3.1 Legal Descriptions

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
416	3	Both Assessor and Treasurer	Land Record Management - Legal Descriptions	Abbreviated legal description	The Application shall store and display an abbreviated legal description (e.g., Hidden Meadows Lot 7 or Addissons Addition Block 12, Lot 49 or T3N,R2E,S12 TL# 89).		
483	3	Both Assessor and Treasurer	Land Record Management - Legal Descriptions	Legal descriptions and linked images	The Application shall interface in real time using a reference number with the Auditor's Imaging Application (Eagle) in such a way that a parcel's legal description in the Application is displayed from the recorded image.		
405	2	Assessor	Land Record Management - Legal Descriptions	Updating, adding legal descriptions	The user shall be able to copy/paste from a datafile (Excise) into the legal description module. The Application shall allow the user to insert, edit, make paragraphs, etc., in a fashion similar to a		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					Word document.		

### 8.9.3.2 New Subdivisions

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
404	3	Assessor	Land Record Management - New Subdivisions	Ability to assess buildings on properties created for the future year	User shall be able to assess a building on a property that was created for the future year. For example, a subdivision was recorded after May 31, 2004. The new subdivision properties were added to the Application for the 2005 assessment year for 2006. If a building permit was issued on any of the newly created properties and a building was constructed (prior to July 31, 2004), the user shall be able to value the building 2004 assessment for 2005 taxes.		
403	3	Both Assessor and Treasurer	Land Record Management - New Subdivisions	Ability to create new subdivisions for future assessment year	The Application shall create new property accounts due to new subdivisions for the future assessment year. For example, plats recorded prior to May 31, 2004, shall be segregated and assessed 2004 for 2005 taxes. Plats recorded after May 31, 2004, shall be assessed 2005 for 2006 taxes.		
402	3	Both Assessor and Treasurer	Land Record Management - New Subdivisions	Creating new property accounts for subdivisions	The Application shall have an automated mechanism to create new subdivision accounts from a datafile.		
513	3	Both Assessor and Treasurer	Land Record Management - New Subdivisions	Subdivision names and book/page numbers	The Application shall allow the record for each lot to store the book/page number, as well as the subdivision name, and allow users to search by book/page number or subdivision name.		
520	3	Assessor	Land Record Management - New Subdivisions	Tracking new subdivisions	The Application shall track new subdivisions from their creation through the revaluing of the new subdivision parcels.		

### 8.9.3.3 Transfers

The property transfer process in most cases is initiated by the creation of an excise document. Creation of the excise document should automatically begin the transfer transaction workflow. The workflow includes delegation of the task, tracking of progress of the transfer.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
417	3	Both Assessor and Treasurer	Land Record Management - Transfers	Land record updates from real estate excise tax data file	The Application shall update property information (name, address, sales module, legal description, etc.) from a real estate excise tax datafile. The Application shall allow the user to edit the information manually. The process shall have a workflow that allows the user to track all records of the data file, from receipt through update in the Application.		

## 8.9.4 Record Maintenance

### 8.9.4.1 Addresses

**Situs addresses:** Addresses must be linked to a building. Buildings must be linked to a parcel. Buildings must allow multiple addresses. Addresses must

meet postal standards and include the City and zip+4. Addresses must contain a unique identifier. Buildings must contain a unique identifier.

**Mailing addresses:** Mailing addresses must meet postal standards.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
481	3	Both Assessor and Treasurer	Record Maintenance - Addresses	Automated updates from datafiles - Real/Personal	Using a workflow mechanism, the Application shall accept automatic updates from data files.		
6	3	Both Assessor and Treasurer	Record Maintenance - Addresses	Mailing address should match postal standards - Real/Personal	The Application shall allow for mailing address fields that match postal standards (ZIP+4).		
540	3	Both Assessor and Treasurer	Record Maintenance - Addresses	Real Property Address Changes	The Application shall allow for Real Property address changes that are capable of being accepted via data-entry and electronically to include the Web. The updates shall place changes in a pending status until data has been verified.		
541	3	Both Assessor and Treasurer	Record Maintenance - Addresses	Real Property Address Changes	The Application shall allow for verification reports that are available both in electronic media and hardcopy.		
542	3	Both Assessor and Treasurer	Record Maintenance - Addresses	Real Property Address Changes	The Application shall handle single-entry or mass-entry of address changes, specifically regarding many accounts with the same owner.		
15	3	GIS	Record Maintenance - Addresses	Situs address - one property, multiple addresses - Real/Personal	The Application shall allow for situs addresses that are stored in the Assessors application and tied to buildings. A property can have multiple buildings and each building can have multiple addresses.		

**8.9.4.2 Annexations**

When an annexation occurs in the State of Washington prior to March 1, the property taxes must be distributed to the new tax code area the following tax year. When an annexation occurs after March 1, the taxes must be distributed to the new tax code area two years later. For example, an annexation occurs January 15, 2004. Taxes collected in 2005 should be distributed to the new tax code area. An annexation occurs April 15, 2004, the taxes collected in 2006 should be distributed to the new tax code area. Exceptions to this rule include the issuing authority of building permits, distribution of road funds and excise tax collection. These areas may be affected by the ‘Effective Date’ of the annexation.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
385	3	Both Assessor and Treasurer	Record Maintenance - Annexations	Annexation update information	The Application shall update (batch and manually): - New tax code area - New PUC flag (a flag that shows if a property is Platted, in an Unincorporated area, or in a City) - Start date for property taxes (the date that property taxes shall be distributed to the new tax code area) - Effective date of the annexation (the actual date that the annexation takes effect, in most instances, different from the property tax start date).		
386	3	Both Assessor and Treasurer	Record Maintenance - Annexations	Annexation update of tax code areas for personal property	Based on the annexation update performed on the real property application, the Application shall automatically recognize properties that are linked to personal property accounts, and shall update the		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					tax code areas on the personal property accounts for the corresponding assessment year.		
897	3	Treasurer	Record Maintenance - Annexations	Record Maintenance - Annexations	The Application shall allow for user defined retention periods for annexation history.		
790	3	Both Assessor and Treasurer	Record Maintenance - Annexations	Annexations	The Application shall query and display annexation history of a property, the dates associated with the annexation, and the look of the property before and after the annexation. In order to access annexation information, it may require interfaces with other systems/applications.		

### 8.9.4.3 Owner Names

A single parcel can have many different interested parties with a claim to ownership. These parties have different classifications or type of interest and may have only a partial ownership of the property.

A single owner can own many different properties. The recorded owner name can vary. It is useful to be able to track all properties owned by a property owner that has various owner names.

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
429	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Multiple owners - Real/Personal	The Application shall accommodate properties/accounts that have multiple owners. Partial ownership shall be classified (e.g., contract buyer, spouse, etc.)		
432	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Multiple properties same owner/AKA - Real/Personal	Owner (individual or company) can have multiple 'Also Known As' (AKA's) aliases that resolve to the same record. If the owner has multiple properties listed under different AKA's, the Application shall provide reports and searches that can be run to identify all properties owned by that owner.		
768	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Percent of Ownership Field	For each owner name record, the Application shall have an associated field to track percent ownership relative to a Property Account Number. E.g. Smith 60% Jones 10% Abbey 30%		
431	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Percent ownership - Real/Personal	The Application shall allow for a percent ownership that can be allocated to an individual partial owner.		
752	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names	The Application shall have a feature that cross-references the PERSONAL property account with a real property account. This is useful to identify where the business is physically located.		
753	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names	The Application shall have a feature that cross-references the Real property account with a personal property account. This is useful to identify all the business at one location.		
754	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names	The Application shall track the changes in names, and have it available for customer service representatives.		
556	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names - Real/Personal	The Application shall be able to classify owners as: Owner, Buyer, and In-Care-Of, and store and cross-reference 'Doing Business As' (d/b/a) name for the owner.		
576	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names	The inquiry by name shall be a wildcard query, and shall query against the three name fields - Owner, Buyer, and In-Care-Of.		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
				Real/Personal			
577	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names Real/Personal	The name fields shall be large enough as not to require any abbreviating.		
578	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names Real/Personal	The Application shall update (or create a method to update) the names and addresses in/for other applications that rely on the new property tax Application for the source of name and address.		
750	3	Both Assessor and Treasurer	Record Maintenance - Owner Names	Record Maintenance - Owner Names Real/Personal	The Application shall have a means to group accounts by a pre-determined common data element such as: Name, address, UBI (Uniform Business Identifier), or other key data element the County may determine appropriate.		

**8.9.4.4 Tables other than Appraisal Tables**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
138	3	Both Assessor and Treasurer	Record Maintenance - Tables other than Appraisal Tables	Table Maintenance	The Application shall allow the appropriate user, based upon security access rights, the ability to add/change/remove items in the appropriate areas of the Application set-up. This is to enable the Application to accommodate changes in the future as they arise.		

**8.10 CUSTOMER SERVICE INQUIRY**

Clark County desires to improve and enhance our customer service information available to representatives from the Assessors Office and Treasurer’s Office. Information that is now in paper form and is retrieved manually, shall be available electronically. It is anticipated that all processes that require customer interaction will be processed through a workflow application.

**8.10.1 Customer Information**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
684	3	Both Assessor and Treasurer	Customer Information	Customer Information	Once the Application has returned the query, the following information shall be available: The actual image of the statement that was mailed to the customer. This information shall be retained for a period of years.		
685	3	Both Assessor and Treasurer	Customer Information	Customer Information	Once the Application has returned the query, the following information shall be available: Sales history, characteristics about the building and land, and account number of personal property associated with the real property.		
696	3	Both Assessor and Treasurer	Customer Information	Customer Information	The Application shall query and display the type of assessment, as well as the geographic boundaries of the assessment associated with a property.		
788	3	Both Assessor and Treasurer	Customer Information	Customer Information	The Application shall have a glossary that shall allow the County to associate definitions with assessments, and link to these definitions after querying on a property. Example of definition: Fire Patrol is an assessment fee levied on forest and unimproved lands that DNR protects from		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					wildfire (RCW 76.04.600). Assessment revenues are used to purchase wildfire engines, hire and train personnel, and other associated costs. For question and concerns, contact the Department of Natural Resource Protection Division at 1-360-902-1300.)		
691	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: Have statements been mailed on this account? How were they generated: By the application (annual mailings), or per customer's request, and the dates they were mailed?		
692	2	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: User shall be able to view any imaged correspondence received from the customer, determine where it is in the process, and if completed, what was the response.		
693	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: To determine if a property has been recently annexed, and what the property looked like before and after the annexation, and all the dates associated with the annexation.		
661	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	The Application shall enable the user to query an account by number, name, site address, mailing address, plat and Geo Code, or by the use of a wild card.		
662	2	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	The Application shall provide a bulletin board, so when logging into the Application, if a major event is happening, or a process is changing, a pop-up bulletin board shall identify the event or change.		
677	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: Assessed values of property, what program property is currently in: Current use, senior exemption, deferral, or any other program that may be developed in the future, the ability to easily view the dates of when the property was put into or removed from a specific program, and the ability to view an image of the actual correspondence to the customer. If the values were frozen, what are those values, and what are the un-frozen values?		
679	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: Ability to view all imaged documents associated with the property. To include but not be limited to: Payment information, deeds, liens, excise tax affidavit, correspondence, etc.		
681	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: What assessments or improvement districts are associated with the property?		
682	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: Payment history during the past five years on real property, assessments and improvement districts, and how the image of the check, coupons or other source documents associated with the payment shall be displayed.		
683	3	Both Assessor and	Customer Information	Customer Information	Once the Application has returned the query, the following information shall be available: What assessments have been assigned to a collection		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
		Treasurer		Real/Personal	agency, and when?		
687	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: Taxes that have been cancelled or supplemented, dates associated with them, and a link to the imaged document that was sent to the customer notifying them of this change.		
689	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	The Application shall have the ability to query and add notes through a narrative tool. This tool shall be used to make notes concerning a customer's account, and available to all users of the Application.		
690	3	Both Assessor and Treasurer	Customer Information	Customer Information Real/Personal	Once the Application has returned the query, the following information shall be available: Any name and address changes that have taken place on this account, and if any name and address changes are pending, where in the process it is.		

**8.10.2 Customer Self-Service**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
595	3	Both Assessor and Treasurer	Customer Self-Service	Customer Self-Service Real/Personal	The Application shall provide a method for the appropriate staff to be notified that a change (name or address) is available to be worked on, or there are pending documents required to complete the change.		
597	3	Both Assessor and Treasurer	Customer Self-Service	Customer Self-Service Real/Personal	The Application shall have a queuing system to store the requested changes from the customer self-service area, where required documents are pending, until the arrival of those required documents.		
600	3	Both Assessor and Treasurer	Customer Self-Service	Customer Self-Service Real/Personal	The Application shall have a tracking mechanism so that customer service representatives will know the status of the requested name/address change.		
590	3	Both Assessor and Treasurer	Customer Self-Service	Customer Self-Service-Real/Personal	The Application shall have a customer self-service tool that is web-based. This application shall allow customers to initiate name and/or address changes, and if necessary, include a list of supporting documents required to complete the change.		

**8.10.3 Customer Service**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
605	3	Both Assessor and Treasurer	Customer Service	Customer Service	The Application shall track the process and status of refunds. This shall include items such as: Type of refund, date entered, date of check, and date mailed. This tracking shall occur for all types of refund checks.		
755	3	Both Assessor and Treasurer	Customer Service	Customer Service	The Application shall have a range of predefined (configured by County staff) letters for customer service representatives to easily and efficiently process correspondence. These letters shall be easily maintainable. The letters shall print, or be put into a queue for printing at a later time. This may include several items (letter and tax statement) which shall be printed in a collated manner. Some examples of letters and forms include: Refund letters, cancellation/supplemental letters, proof of taxes paid letters for short plat, condo, mobile homes, plats, and collection letters,		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					problem mail returns, petition refund, DNR fire patrol, foreclosure affidavit, and senior applications.		
606	3	Both Assessor and Treasurer	Customer Service	Customer Service Real/Personal	The Application shall provide a means for the County to develop custom reports and/or ad-hoc queries (that can be saved), and make them available for County staff.		
608	3	Both Assessor and Treasurer	Customer Service	Customer Service Real/Personal	The Application shall have an efficient process for customer service representatives to request changes to a property account, and to efficiently process those requests. These requests may include items such as: Request a duplicate tax statement, request mailing name/address changes, and a do not send flag (do not send statement to mortgage company). There may be multiple sources of these requests: Cashier, customer self-help, web, IVR. All of these changes shall become part of the history of the property account.		
609	2	Both Assessor and Treasurer	Customer Service	Customer Service Real/Personal	The Application shall have the ability to interface with other County applications. These applications shall include, but not be limited to: The recording system (Eagle Recording Application), or the segregation messaging system (SMURF). Having this information, even though it may reside outside the property tax system, is very useful for customer service representatives.		

8.10.4 History

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
505	3	Both Assessor and Treasurer	History	Dynamic link from excise to recorded document - Real/Personal	The Application shall be configured to have a dynamic link from an excise document to the recorded document image stored in the Eagle Recorder Imaging Application.		
408	3	Both Assessor and Treasurer	History	Edit history - Real/Personal	The Application shall edit history entries that are the result of data entry errors. An audit trail shall show that the history entry was corrected, when, by whom, and what the previous entry was.		
506	3	Both Assessor and Treasurer	History	Excise documents with multiple property numbers - Real/Personal	The Application shall store a data record of all related excise documents property/account numbers.		
406	3	Both Assessor and Treasurer	History	History - User defined categories for notes - Real/Personal	The Application shall allow the user to add notes that become part of the parcel's history. The notes shall be categorized based on user-defined rules. Examples include notes from the senior exemption process, notes from the current use assessment process, notes from boundary line adjustments, notes relating to the market assessment of the property, etc.		
407	3	Both Assessor and Treasurer	History	History and program updates - Real/Personal	The Application shall capture all update activities and store them in the history of a property, along with the dates of when each activity is updated. Examples include but not limited to: - Segregation - Combinations - Cancellations and supplements - Name changes - Address changes - Revaluation of property - Changes to the abbreviated legal		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					description		
587	3	Both Assessor and Treasurer	History	History-Real/Personal	The Application shall keep all changes, notes and updates associated to the property. These changes and updates become part of the property's history. This history shall be available, real-time, for customer service representatives.		
507	3	Both Assessor and Treasurer	History	Inactive/retired properties - Real/Personal	The Application shall permit users to view historic information on inactive/retired properties/accounts.		
509	3	Both Assessor and Treasurer	History	Narrative comments - Real/Personal	The Application shall provide for narrative comments about the property/account.		
508	3	Both Assessor and Treasurer	History	Scope of historical information - Real/Personal	The Application shall preserve all historical information about a property/account.		
414	3	Both Assessor and Treasurer	History	Viewing value history - Real/Personal	The Application shall display (in chronological order) the value history of a property/account.		

**8.11 GLOBAL APPLICATION REQUIREMENTS**

**8.11.1 System Design and Features**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
129	3	Both Assessor and Treasurer	System Design Features	Data Entry and query - property account number (account number for personal property) - Real/Personal	The Application shall allow the user to move between screens and programs without the need to reenter the property account number (i.e., maintains context when navigating).		
378	2	Assessor	System Design Features	Display of mandatory fields	The Application shall clearly display mandatory fields (different shading, color, or other mechanism).		
163	3	Both Assessor and Treasurer	System Design Features	Forced Entries - Real/Personal	The Application shall allow selected fields to be required fields; users cannot proceed to another screen without entering data in required fields. Required fields shall be highlighted, or otherwise identified as required.		
185	3	Both Assessor and Treasurer	System Design Features	Microsoft/Windows type functions - Real/Personal	The Application shall use Microsoft standard capabilities, such as copy, cut & paste, multiple windows open simultaneously, split screen, cascading, undoing complete edit changes, etc.		
208	3	Assessor	System Design Features	Neighborhood Narrative Descriptions	For each neighborhood grouping created in the CAMA, the Application shall provide a narrative descriptive field for a historical record of the last physical reappraisal and subsequent annual updates (actual percentage adjustment(s) applied to land and to building), a brief description of the neighborhood, and related demographic data. The narrative and descriptive statistics shall be available to the review appraiser, and shall be available for export to outside applications to assist in writing reports.		
161	3	Both Assessor and Treasurer	System Design Features	Screen Design - Background Colors & Fonts - Real/Personal	The Application shall allow screen background color and font color style to vary by type of process (e.g., what if scenario screens would have blue background, and active screens would have a white background).		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
160	3	Both Assessor and Treasurer	System Design Features	Screen Design - Background Colors & Fonts - Real/Personal	The Application shall allow an administrative override to lock out individual screen background color choices, font color, and style choices, to create a uniform look to screens throughout the Application.		
159	3	Both Assessor and Treasurer	System Design Features	Screen Design - Background Colors & Fonts - Real/Personal	The Application shall allow each user to select their own screen background colors and font colors.		
139	3	Both Assessor and Treasurer	System Design Features	Spell-checking - Real/Personal	The Application shall have a spell-checking function for memo and comment fields.		
135	3	Both Assessor and Treasurer	System Design Features	Tool Bars and Menus - Real/Personal	The Application shall provide user-definable tool bars and menu options. These settings shall be specific to a user or a desktop, i.e., each user can have their own configuration.		
217	3	Assessor	System Design Features	Value Identification	The Application shall clearly identify for each property the method used to develop the assessed value.		
218	2	Assessor	System Design Features	Value Identification	The Application shall list all PAN's used in the development of an assessed value. For example, Parcel A is the subject parcel and is valued on the income approach. A portion or all of the land value from Parcel B and Parcel C is needed in the development of Parcel A's income approach to value. Parcel A's record would reference Parcel B & C's property account number..		
162	3	Assessor	System Design Features	Value Summary Screen	The Application shall have one screen where all related values (land, land add ons, building, building add ons, outbuildings, new construction value, exemption amounts, senior values, land use values etc.) are listed for a given property account number.		

### 8.11.2 Reports

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
188	3	Both Assessor and Treasurer	Reports	Ad hoc data query capabilities - Real/Personal	The Application shall have non-proprietary ad hoc data query capabilities.		
186	3	Both Assessor and Treasurer	Reports	Ad Hoc Reporting - Real/Personal	The Application shall allow users to create ad hoc reports/queries, based on any field, and across multiple years.		
866	2	Assessor	Reports	Management reports - workload	The Application shall generate reports that allow management to forecast workloads and monitor workload status. Examples: How many parcels are in the reval area? How many parcels need to be inspected for new construction? What is the status of these parcels (have they been inspected, has data entry been done, etc.)?		
194	3	Both Assessor and Treasurer	Reports	Queries and Reports - Output - Real/Personal	The Application shall have the ability to send queries and reports to printer, fax server, e-mail client, or file in several application formats (Example: HTML, Acrobat, Word, Excel, etc.).		
191	3	Both Assessor and Treasurer	Reports	Query Capabilities	The Application shall allow the user to query comparable neighborhoods, and view neighborhood data either online, in a printed paper report, or in a file that can be exported to programs such as Access or Excel.		
197	3	Both Assessor and	Reports	Report Writer -	The Report Writer Application shall support the import of form files in standard graphic formats,		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
		Treasurer		Real/Personal	such as PDF, JPG, TIF, WMF and EPS.		
209	3	Both Assessor and Treasurer	Reports	Report: NH Inventory	The Application shall generate an "on-line" or printed neighborhood inventory report where the neighborhood is selected by the user. (Vendor shall supply sample neighborhood inventory report).		
195	3	Both Assessor and Treasurer	Reports	Reports - Real/Personal	The Application shall provide for custom-built reports. A report-builder tool shall be provided with the Application. County support staff shall be trained to build ad hoc reports, as well as new generally-accessible reports via the reports menu.		
201	3	Both Assessor and Treasurer	Reports	Running Reports - Real/Personal	The Application shall allow the user to run reports while the online Application is in use.		
192	3	Both Assessor and Treasurer	Reports	Search Capabilities - Real/Personal	The Application shall allow for searching, using common operations (>),		
198	3	Both Assessor and Treasurer	Reports	Search Capabilities - Real/Personal	The Application shall support phonetic/Soundex searching of text fields.		
187	3	Both Assessor and Treasurer	Reports	Search Capabilities - Real/Personal	The Application shall support searching by multiple data elements simultaneously, and support partial search strings or wildcards.		
34	3	Both Assessor and Treasurer	Reports	Value Error Parameter Reports	The Application shall produce error and warning reports that identify records with actual or potential valuation or data entry problems (e.g., PT Code 0011 GLA >20,000 or A/V >\$20,000,000)		

**Questions**

898	Describe any State of Washington report that the Application has as a standard report.
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**8.11.3 Interfaces and Integration**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
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**Questions**

915	Describe your implementation team's experience in interfacing the Application with other applications.
916	Give the maximum number of applications your Application has interfaced with. Provide a brief description of the application and each interface developed to support that application.
1100	Appendix I provides a list of all current required interfaces. Please describe how you will handle the interface development for each application described in the appendix.

**8.11.4 General Functional Requirements**

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
14	3	GIS	General Functional Requirements	Assignment of property account numbers to all accounts (Condominiums, Mobile Homes,	The Application shall enable user to link all accounts (e.g. Condominiums, Mobile Homes, accounts with Buildings only, Personal Property, etc.) to a property account number that represents the land the assessment is located on. In the case of a condominium complex all property account		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
				Buildings only, Personal Property, etc.)	numbers of the complex should be able to link to the first account number of the complex, to provide a link to the label on the GIS polygon.		
16	3	GIS	General Functional Requirements	Batch update utility - Real/Personal	The Application shall provide a secure, auditable and efficient method for batch uploading changes to Zoning, tax district, lot size, jurisdiction, etc., from the GIS or other County Applications (Auditor, Building Permits).		
51	2	Assessor	General Functional Requirements	Comparable Sales Viewing	The Application shall enable users to view comparable sale properties alone or with an option of simultaneous viewing the subject property and three or more comparables.		
137	3	Both Assessor and Treasurer	General Functional Requirements	Computer based training - Real/Personal	The Application shall provide a computer-based training (CBT) program that can be used for staff training for common functional topics.		
180	3	Both Assessor and Treasurer	General Functional Requirements	Edit and Input - Real/Personal	For day-to-day activities, such as cancellation/supplements or segregations/combinations, the Application shall provide real-time edit and input capabilities. Example: When a cancellation update is performed, the updated information shall be available immediately, and not stored for batch updates performed at a later time.		
522	3	Both Assessor and Treasurer	General Functional Requirements	Exempt properties - Real/Personal	The Application shall process all non-profit and other exempt properties through the assessment cycle (establish market/current use values) without generating a tax bill.		
46	3	Assessor	General Functional Requirements	Export Appraisal Tables	The Application shall allow users to export all tables to various PC-related applications including, but not limited to MS Excel, MS Access, and MS Word.		
140	3	Both Assessor and Treasurer	General Functional Requirements	Exporting Data - Real/Personal	The Application shall have the ability to export data in the following formats: Text file, tab, delimited or fixed, MDB, DBF and XML.		
215	3	Both Assessor and Treasurer	General Functional Requirements	Flag for Parcels with Advance Tax Collections - Real/Personal	The Application shall automatically flag a parcel when the Treasurer issues/collects advance taxes. This flag shall allow assessed value modifications only if special user-defined override specifications are met.		
211	3	Both Assessor and Treasurer	General Functional Requirements	Inactivate And Reactivate Accounts - Real/Personal	The Application shall allow the user to inactivate and reactivate an account for assessment purposes only (regardless of whether or not taxes or special assessment fees are still owed on the property).		
441	3	Assessor	General Functional Requirements	Internal Tables for valuation and identification.	The user shall be able to create custom tables, expand and/or delete tables, for both land and improvements.		
19	3	Both Assessor and Treasurer	General Functional Requirements	Legislative Requirements - Real/Personal	The Application shall accommodate all Washington State constitutional and statutory assessment and reporting requirements, as well as DOR rule changes.		
213	3	Both Assessor and Treasurer	General Functional Requirements	Link to Active Real Property Parcels	The Application shall link any structure-only account (e.g., Mobile Homes, airplane hangers, etc.) to an active real property parcel.		
125	3	Assessor	General Functional Requirements	Maintain and process multiple years of data - Real/Personal	The Application shall support maintaining and processing multiple years of property data (characteristics, valuation, cost tables, values, etc.) for at least 3 prior and 2 future years.		
439	3	Assessor	General Functional Requirements	Mid-year Value Changes	At any point in the assessment year, the Application shall allow a user to batch update values for groups of parcels selected by the user.		
131	3	Both Assessor and	General Functional	Notes -	The Application shall provide the ability to create notes that can be attached to a property account		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
		Treasurer	Requirements	Real/Personal	number, and can also be categorized by type.		
127	3	Both Assessor and Treasurer	General Functional Requirements	Online Help - Real/Personal	The Application shall provide online help for all levels of the Application, including: General help, screen help, transaction help, data entry help, and help at the field level. Help features shall also be available on field devices. The Application Administrator shall be able to access and customize all levels of online help and other help features available on field devices.		
438	3	Both Assessor and Treasurer	General Functional Requirements	Report 'top "n" number tax payers	The Application shall generate a top 'n' number taxpayers within a taxing district report (real and personal property combined), based on the owner's name, including aliases or 'Also Known As', or 'Doing Business As'.		
270	3	Both Assessor and Treasurer	General Functional Requirements	Reporting - Datamart - Real/Personal	The Application shall include a datamart or data warehouse for simplified ad hoc reporting, and reduced server load on the Application when running complex or large reports.		
212	3	Both Assessor and Treasurer	General Functional Requirements	Returned Mail - Real/Personal	The Application shall process returned mail using barcode technology, and other current technologies. (Describe.)		
147	3	Both Assessor and Treasurer	General Functional Requirements	Scanned Images - Interfaces - Real/Personal	The Application shall support links to scanned images stored in the Auditor's Imaging Application, Public Works' ACORDE Imaging Application, excise affidavits, remittance, and point of sale images. (Or any County imaging solution)		
182	3	Both Assessor and Treasurer	General Functional Requirements	Scanning - Emerging Technologies - Real/Personal	The Application shall support emerging technologies for scanning documents that allow for updating, gathering, transferring, and disseminating data. (Please describe.)		
134	3	Both Assessor and Treasurer	General Functional Requirements	Scheduling Batch Updates - Real/Personal	The Application shall support the scheduling of batch jobs at a specific date and time.		
214	2	Assessor	General Functional Requirements	Store And Display Filing Information	The Application shall be able to store and display the filing information for each exemption or current use account (e.g., Historic Property Exemption, 30% Homeowner's Exemption, Senior Exemption, etc.).		
271	3	Both Assessor and Treasurer	General Functional Requirements	Store and launch related files - Real/Personal	The Application shall create a link to related files, such as Word documents, Excel spreadsheets, scanned documents, data files, etc., from within the proposed Application. Preferably, the Application shall launch the associated file with a click on the hyperlink or field.		
128	3	Both Assessor and Treasurer	General Functional Requirements	Summary screens	The Application shall provide summary screens. Example: Allows the user to view all data pertinent to the current year's assessment, including the appraised (market) value and assessed (taxable) value.		
231	3	Both Assessor and Treasurer	General Functional Requirements	System Search Function - Using searches to find parcels - Real/Personal	The Application shall allow user to search for accounts by owner name, buyer name, house number, street, APN, geocode #, plat #, plat name, legal description, or other desired fields. The Application shall search by exact word/number/phrase, or a portion of a word or number. For example, to find a parcel belonging to John Frostmeyer, user shall be able to search by entering 'meyer' to generate results containing the string 'meyer' in the name field.		
144	3	Both Assessor and Treasurer	General Functional Requirements	Tracking Special Exemptions	The Application shall track the beginning and end dates of special property exemptions. Examples: Historic Properties, Multifamily Tax Abatement,		

ID#	P	DEPT.	SUBJECT AREA	TITLE	DESCRIPTION	VENDOR RESPONSE	VENDOR NOTES
					30% Homeowner's Exemption, etc.)		
142	3	Both Assessor and Treasurer	General Functional Requirements	User defined flags	Based on user defined criteria, the Application shall automatically (autofill) special flags to a parcel. The user shall also be able to manually enter flags and shall be able to generate reports by flag type.		
21	3	Both Assessor and Treasurer	General Functional Requirements	USPAP Compliant	The Application shall be USPAP-compliant.		
216	3	Both Assessor and Treasurer	General Functional Requirements	View All Taxes - Real/Personal	The Application shall display all taxes and assessments on a property account number in one screen (e.g., Real Property, Personal Property, Special Assessments, etc.).		
510	3	Both Assessor and Treasurer	General Functional Requirements	Workflow capabilities - Real/Personal	The Application shall provide automated workflow capabilities that are configurable by Clark County.		
146	3	Both Assessor and Treasurer	General Functional Requirements	Workflow tracking system - Real/Personal	The Application shall provide a workflow management and tracking tool for all workflow regarding office and field assignments. This includes determining the amount of work, scheduling, distribution and redistribution of work, unit counts, various time unit measurement reports, progress of assignments, and potential for weekly/monthly/annual reports, and planning for future years.		

**Questions**

184	How does the Application provide and maintain audit trails for real and personal property management and quality control?
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**9 IMPLEMENTATION AND MANAGEMENT APPROACH (PROPOSAL SECTION 4)**

(Page Limit: 15)

**Instructions:**

In the following Section, please provide concise yet complete answers to each of the questions. If you choose not to respond to a question, please type “Not Applicable” and explain why you are not answering. You may compose your answers to encompass more than one question; however, if you do so, you must make it clear which questions are being addressed.

You may include diagrams, examples, charts, etc., to answer the question.

The ID numbers at the end of each question are for internal Clark County use.

1. At a high level, outline and describe your system’s implementation process, from initial contract award and engagement, through analysis, deployment and hand-off to Clark County. *(ID# 631)*
2. Describe the process for configuring your software solution. Include how you will ensure that it meets the business process needs. Describe how configuration changes are documented. *(ID# 632)*
3. Describe the major application testing approaches you use during the integration and implementation of your application. *(ID# 633)*
4. Describe your approach to successful data conversion. Where does your experience show that problems will likely be encountered (e.g., tax billing history, parent/child parcel history, etc.)? *(ID# 634)*
5. Describe the management process you use to control scope and cost during implementation. *(ID# 635)*
6. Provide your view of the project organization (chart, FTE count, etc.) required to implement your solution. Include a brief description of each major role. *(ID# 636)*
7. Identify the proposed project staff (including subcontractors) in the table below providing implementation and training. Indicate the percentage of their time that each staff member is dedicating to the project, their years of experience with the proposed product and their business location. *(ID# 637)*

Staff member name	Location	Title	Primary company or sub contractor	% time dedicated to project

8. Please complete the following for each of the staff members listed in response to the previous question. You may also attach their resumes.

Staff member name:	
Position in the company:	
Length of time in position:	
Project position and responsibilities:	
Education:	
Previous work experience:	
Technical skills and qualifications for the project position:	
Experience installing proposed system:	
Client name:	
Contact person and phone number:	
Client size (population or customers served):	
Project position/responsibilities:	
Start date:	
Scheduled end date:	
Actual end date:	

9. Describe, and provide at least two (2) samples of, your method for documenting (non-configuration) technical changes, such as might occur with code or table changes. (ID# 638)
10. Describe your solution's ability to integrate/interface with the systems and requirements listed in the section above titled "Clark County Current Information Infrastructure." Characterize, in terms of complexity, time, and the amount of configuration or programming that might be needed to enable this integration. (ID# 639)
11. Explain how your solution facilitates future changes, management of "software patches" and version control. How does your solution support the distribution of patches and fixes? (ID# 640)
12. Identify the office from which this project would be managed (should your solution be selected), its address and main telephone number, and its primary function. (ID# 641)
13. Describe your solution's ability to accommodate standard E-commerce, Electronic Data Interchange (EDI) and Electronic Funds Transfer (EFT). Characterize, in terms of complexity, cost, and time, the amount of configuration or programming that might be needed to enable these features. (ID# 642)

14. Describe how you will successfully ensure adequate transfer of knowledge to Clark County employees, both technical and user. *(ID# 643)*
15. List available training courses. The training must be comprehensive enough to ensure that Clark County staff and systems personnel can effectively use and maintain the system. (Our training expectations are documented in the “Training” subsection of the “Scope of RFP” section of this document.) *(ID# 645)*

For each course, describe:

- **Course Name**
- **Audience**
- **Contents / Learning Objectives**
- **Prerequisites / Skill Level**
- **Instructional Method** (classroom, self-study, computer tutorial, on-the-job instruction)
- **Duration** (in hours or days)
- **Facility requirements** (Computer Lab, Conference Room)
- **Materials required** (such as audiovisual equipment or Internet access)

For estimation purposes, please utilize the information provided in the “User Count” subsection of the “Scope of RFP” section earlier in this document. State your assumptions regarding:

- Superusers
- Regular users
- Management users
- Infrequent users
- Technical support users

Please state whether you plan to provide direct training, or plan to use a train-the-trainer approach, and the cost associated with each approach.

Provide a suggested schedule for user training.

Include two (2) copies of a sample of your training material.

16. Describe all of the (technical and end-user/business) user groups, conferences, and other support mechanisms that exist for your solution. *(ID# 646)*
17. Describe your software licensing process and any license options. Include a copy of your typical license agreement. *(ID# 647)*
18. Assuming a project start date of June 15, 2005 provide a sample project schedule (timeline) that begins with initial contract award, and ends with deployment. *(ID# 991)*
19. Include other implementation approach information that you believe pertinent to this RFP. *(ID# 649)*

## 10 SUPPORT AND MAINTENANCE (PROPOSAL SECTION 5)

(Page Limit: 15)

### **Instructions:**

In the following Section, please provide concise yet complete answers to each of the questions. If you choose not to respond to a question, please type "Not Applicable" and explain why you are not answering. You may compose your answers to encompass more than one question; however, if you do so, you must make it clear which questions are being addressed.

You may include diagrams, examples, charts, etc., to answer the question.

The numbers at the end of each question are for internal Clark County use.

1. On an ongoing basis, how many database administrators and software support personnel are recommended to support your proposed solution? What are their roles/duties? *(ID# 614)*
2. Explain how your solution facilitates future changes, management of the "software patches" and version control. Include how your solution supports the distribution of patches and fixes. Provide a sample of the technical documentation that would accompany the patch or fix (5 copies). *(ID# 615)*
3. Approximately how often are major software versions released? Patches and fixes? How do you inform your customers of the release? *(ID# 616)*
4. Will you correct, without charge, any errors that are discovered after installation of the application? Will this support continue for the life of the system? *(ID# 617)*
5. If program errors are discovered at another user's site, how will Clark County's system be corrected? *(ID# 618)*
6. Provide a list of known outstanding errors/system deficiencies and a schedule for resolution. *(ID# 619)*
7. Describe how customer-requested enhancements to the system are handled. Include pricing structure. *(ID# 620)*
8. When do you anticipate the next update of your current release? What changes are planned? How long do you support each version? *(ID# 621)*
9. Describe the policy for updating the application when new releases of support software become available (e.g., new release of the database or server operating system). *(ID# 622)*
10. How do customers who have already licensed a product receive a new version or release of the product? *(ID# 623)*
11. Describe cost considerations (if any) to your current customers when an application undergoes major redesign and a customer wishes to implement the new release. *(ID# 624)*

12. Explain procedures to retrofit all customization made by the contractor for Clark County into new releases of the application. Describe regression testing procedures used to ensure that previous changes are not impacted by the new release. *(ID# 625)*
13. What is your guaranteed response time for support calls? What is your average response time for support calls? *(ID# 626)*
14. Is telephone support available on an ongoing basis? What are the times during the day that it is available? Is the cost of this support included in the Maintenance costs? *(ID# 627)*
15. Explain your procedures for resolving customer problems. Provide a list of these procedures, if available. Identify any tools used for help desk management/issue tracking and resolution. *(ID# 628)*
16. How do you maintain compliance with USPAP standards when new versions are released? Do you have a USPAP compliance specialist? *(ID# 629)*

### 11 COST (PROPOSAL SECTION 6)

(Page Limit: 5 Pages)

**Instructions:**

In the following Section, please provide your estimate for each of the line items represented. Clark County understands that additional good-faith negotiations will occur prior to contract finalization.

**ITEMIZATION IS MANDATORY, DO NOT PROVIDE ONLY A SUMMARY COST.**

State all of your assumptions. If you are proposing optional costs, complete the table below for each option.

Clearly state your unit of measurement for each cost item (e.g., seat license, user, parcel, etc.).

If the table does not exactly fit your pricing method (e.g., your data conversion costs are table-based instead of labor-rate based), you may change the format for that item only. Make every attempt to itemize and detail your cost.

**11.1 SOFTWARE LICENSE COSTS**

List all software modules proposed and break down line-item costs where possible. Include version or model number where possible. Please add rows as needed. Please define your modules according to functional categories, such as:

- Assessment software (by module)
- Treasurer software (by module)
- Administrative software (by module)
- Report-writing software
- Statistical analysis software
- Sketching software
- Technical integration tools, APIs or other third-party software

APPLICATION / MODULE & DESCRIPTION	UNITS OF MEASURE	UNITS	COST PER UNIT	TOTAL COST
<b>Software License Subtotal</b>				

**11.2 SOFTWARE CUSTOMIZATION COSTS**

Please identify any costs to customize your software to meet requirements not included in the base package. Identify each customization according to the software module you listed in the previous section. Please state your customization assumptions.

CUSTOMIZATION & MODULE	PROGRAMMING HOURS	COST PER HOUR	TOTAL COST
<b>Software Customization Subtotal</b>			

**11.3 INTERFACE COSTS**

Please identify your costs to build the interfaces previously described in the “Interfaces” subsection of the “Scope of RFP” section of this document. (Also refer to the Interfaces Appendix.) Please state your assumptions.

INTERFACE	PROGRAMMING HOURS	COST PER HOUR	TOTAL COST
<b>Interface Development Subtotal</b>			

**11.4 DATA CONVERSION COSTS**

Please identify your costs to convert the data previously described in the “Data Conversion” subsection of the “Scope of RFP” section of this document, and in the “Data Conversion Guidelines” appendix. Please state your assumptions.

INTERFACE	PROGRAMMING HOURS	COST PER HOUR	TOTAL COST

INTERFACE	PROGRAMMING HOURS	COST PER HOUR	TOTAL COST
<b>Data Conversion Subtotal</b>			

**11.5 TRAINING COSTS**

Clark County recognizes the importance of effective training in the areas of application usage, management/operations, technical and data conversion. If selected, the vendor must furnish a training plan that will address these needs. It is also expected that the successful vendor will provide access and updates to training materials and recommendations for additional training. In the cost matrix below, please use the course names and assumptions previously described in your response to the “training” question in the “Implementation and Management Approach” section.

	HOURS	COST PER HOUR	TOTAL COST
Training plan development			
Training material customization/development			
Training (itemized by course)			
Training (itemized by course)			
Training (itemized by course)			
Training (itemized by course)			
Training (itemized by course)			
Training (itemized by course)			
Training (itemized by course)			
<b>Training Subtotal</b>			

**11.6 OTHER IMPLEMENTATION COSTS**

Please identify costs to implement your software not already covered in the sections above. Feel free to revise the contents of the table to match your implementation roles, but be sure to include the details behind your calculations.

	HOURS	COST PER HOUR	TOTAL COST
Needs analysis			
Design			
Configuration			
Programming			
Project management			
Other			
<b>Other Implementation Subtotal</b>			

**11.7 HARDWARE COSTS**

Hardware is not included in this procurement. Please identify any recommended non-server hardware, such as portable computers, but do not provide pricing.

**11.8 SUMMARY PROJECT LABOR COSTS**

ACTIVITY & DESCRIPTION	LABOR HOURS	COST PER HOUR	TOTAL COST
Software customization labor (subtotal from table above)			
Interface development labor (subtotal from table above)			
Data conversion labor (subtotal from table above)			
Training labor (subtotal from table above)			
Other implementation labor (subtotal from table above)			
<b>Project Labor Subtotal</b>			

**11.9 HOURLY LABOR RATES**

Please state hourly labor rates for this project. Rates are to remain in effect until successful implementation and acceptance of the product.

ROLE	COST PER HOUR
Project management	
Product consulting	
Programming & product customization	
General configuration support	
Data conversion	
Interface development	
Training development (curriculum developer or technical writer)	
Training (trainer)	
Help desk support (regular business hours)	
Help desk support (after business hours)	

**11.10 TRAVEL COSTS**

For all travel, itemize the following:

- Number of trips
- Purpose of each trip
- Number of employees traveling
- Transportation costs
- Lodging / meal costs
- Local transportation costs
- Other / miscellaneous costs
- Assumptions for billable hours for travel time

Please generate your own table for presenting travel costs, but provide specific calculation details and assumptions.

**11.11 ANNUAL & RECURRING COSTS**

	LICENSING COST PER YEAR	MAINTENANCE COST PER YEAR
Assessment software (list modules)		
Taxation management software (list modules)		
Report-writing software		
Database (if included in this bid)		
Other software/3 <sup>rd</sup> party software (list)		
Source code/escrow fee		
(Other)		

## 12 REFERENCES (PROPOSAL SECTION 7)

(Page Limit: 2 Pages)

### **Instructions:**

In the following Section, please provide concise yet complete answers to each of the questions. If you choose not to respond to a question, please type “Not Applicable” and explain why you are not answering. You may compose your answers to encompass more than one question; however, if you do so, you must make it clear which questions are being addressed.

We understand that providing contact information for your clients may cause your clients to receive numerous telephone calls—especially if the same client is used frequently. We ask that you contact your references prior to listing them below, and discuss this topic with them.

Some vendors elect to provide reference information only after they believe they are being considered for the next selection step. However, Clark County plans to contact references related to each proposal—it is part of our scoring and evaluation process.

The numbers at the end of each question are for internal Clark County use.

1. Please list five (5) references where you have installed solutions very similar to the one you are proposing. This solution should have been in place for at least one full year. Include the following information:
  - ✓ Organization name
  - ✓ Department or any sub-organization, if applicable
  - ✓ Physical address
  - ✓ Point-of-contact still employed at the site
  - ✓ Point-of-contact’s telephone number
  - ✓ E-mail address.

We understand that it may be difficult to list references similar to Clark County, but please make every effort to do so. The ideal reference would be a County with 150,000+ real parcels, with a solution installed that covers integrated Assessment, Treasury and GIS functionality.

2. Identify two (2) references—possibly from those listed above—that you believe it would be valuable for a team from Clark County to visit. Include complete contact information.
3. List two (2) references where you have not been successful. Explain why.

## **13 APPENDICES**

The appendices are not attached to the hardcopy provided by Clark County Procurement—they are available only on the Clark county website.

### **13.1 APPENDIX A – PROPOSAL RESPONSE FORM**

### **13.2 APPENDIX B – CURRENT SOFTWARE OVERVIEW**

### **13.3 APPENDIX C – CURRENT SOFTWARE OVERVIEW DIAGRAM**

### **13.4 APPENDIX D – MAINFRAME DATA ARCHITECTURE**

### **13.5 APPENDIX E – DATA CONVERSION EXPECTATIONS**

### **13.6 APPENDIX F – OVERVIEW OF WASHINGTON’S TAX STRUCTURE** (prepared by the Senate Ways and Means Committee, October 1, 2004)

### **13.7 APPENDIX G – REPORT SAMPLES**

### **13.8 APPENDIX H – SELECTED SCREENSHOTS**

### **13.9 APPENDIX I – INTERFACES**

### **13.10 APPENDIX J – GLOSSARY OF TERMS AND ACRONYMS**

### **13.11 APPENDIX K – ACTIVITY SCHEDULE**

### **13.12 APPENDIX L – PENALTY CALCULATIONS**

### **13.13 APPENDIX M – ACCOUNT CODING SAMPLE**

### **13.14 APPENDIX N – SUPPLEMENTAL DEMONSTRATION QUESTIONS**

## **Appendix A - Proposal Response Form**

The "Proposal Summary" form on the following page is designed to serve as the cover sheet for your proposal. Do not attach cover letters, title pages, or blank sheets ahead of this form, nor substitute letterhead paper for it. This form must be signed by a person authorized to make proposals and enter into contract negotiations on behalf of your agency.

If this proposal is the product of a partnership between vendors, a single, consolidated Proposal Response Form is required from the vendors. Please modify the form as needed to include company and contact information for each vendor proposing. Clearly identify the vendor with prime responsibility. An authorized representative of each party to the proposed solution must sign the form.

## **Proposal Response Form**

Clark County RFP#:	404
RFP Title:	County Assessment, Taxation Management & Local Improvement District Software
Legal Name of Applicant Agency:	
State of Incorporation:	
Address of Applicant Agency:	
Primary Contact for Applicant Agency:	Name: _____ Title: _____ Phone: _____ Cell Phone: _____ Fax: _____ E-mail Address: _____ Location: _____
Federal Tax ID Number	
Total Funds Requested Under this Proposal (in US dollars):	
Did outside individuals or agencies assist with preparation of this proposal? (If yes, describe)	

In accordance with Clark County's RFP #404 titled "County Assessment, Taxation Management & Local Improvement District Software" and approved Monday, March 14, 2005, the undersigned hereby agrees to furnish the services, materials (except those stated in this RFP to be furnished by Clark County), software and licenses in accordance with this proposal.

The undersigned understands that, if chosen as a final vendor, additional good-faith contract negotiations will occur, and that the attached proposal shall serve as a basis for that negotiation.

I certify that to the best of my knowledge the information contained in this proposal is accurate and complete and that I have the legal authority to commit this agency to a contractual agreement. I realize the final funding for any service is based upon funding levels, and the approval of the Clark County Board of Commissioners.

\_\_\_\_\_  
Signature, Administrator of Applicant Agency

\_\_\_\_\_  
Date

**APPENDIX B – CURRENT SOFTWARE  
OVERVIEW OF  
EXISTING CLARK COUNTY CATS  
& RELATED SYSTEMS**

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## 1. Admin Refund Processing

Purpose/business processes (related to CATS)	<p><i>File name: dbrfndap97.mdb</i></p> <p>This database is used to select, batch and create a file for Oracle, which produces the check. This is the Payment portion of the refund process. Used to select appropriate checks that are ready to for payment, creating a flat file for importing to Oracle.</p>
Vendor-supplied or custom-developed?	Custom-built, in-house
Database	Access97
Transactions volumes	Approx. 1,700 checks Annually. (Roughly 142 per month)
Interfaces/exports	<p>Links from:</p> <ul style="list-style-type: none"> <li>• Cashier</li> <li>• Loan Refund Processing</li> <li>• Petition/Extraction Refund</li> <li>• Creates a flat file to Oracle AP specification for importing.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Cashier</li> <li>• Loan</li> <li>• Petition/Extraction Refund</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Prelim &amp; Final Batch Reports</li> <li>• Various Treasurer's Receipts (TR's) that are receipted into CATS.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<p><b>Fiscal Account</b> – Control point and verification</p> <p><b>Accountant</b> – Final batch, load file and print checks in Oracle AP.)</p>

## 2. Advanced Taxes

Purpose/business processes (related to CATS)	<i>File name: Advanced Taxes.xls</i> Tracks advance tax collections for Real Property, Personal Property and Mobile Homes
Vendor-supplied or custom-developed?	Custom-developed spreadsheet to aid in reconciliation and posting of Advance taxes as well as aid Assessors office in certification process.
Database	Excel
Transactions volumes	Approximately 500 transactions per year (roughly 42 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Oracle FMS</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Miscellaneous receipt and source documents to enter account number, property value, tax collected and document number.</li> <li>• Assessor's office verifies values for certification to ensure that prepaid taxes based on values are accurate for coming year.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Reports are used to reconcile GL monthly and annually as process payments in future year</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Data Management</b>

### 3. Aging Reports

Purpose/business processes (related to CATS)	<p><i>File name: RIDDel.xls</i></p> <p>Generates aging reports for the following areas:</p> <ul style="list-style-type: none"> <li>• Lighting Assessments</li> <li>• Clean Water</li> <li>• Utility district</li> <li>• Land use</li> <li>• CRIDs</li> <li>• Drainage</li> <li>• Diking</li> </ul>
Vendor-supplied or custom-developed?	Custom-developed
Database	Excel
Transactions volumes	Created on a monthly basis as part of month end process on 47,000 accounts (one per area per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Quiz report from LID</li> <li>• Road Lighting (RLD/LUD) system at Clark Public Utilities</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Quiz report from LID which is imported into an Excel file. Accounts are tracked by type, age and dollar amount. Used to assist with collection process.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Data Management</b>

#### 4. Automated Voice Response System (AVRS)

Purpose/business processes (related to CATS)	The Automated Voice Response System is used to provide tax assessment (e.g., lighting assessments) information via telephone. People can request reissued statements through this system. Contents are similar to those in the searchable web page.
Vendor-supplied or custom-developed?	Vendor-supplied
Database	Sonant (proprietary PC-based platform running on NT)
Transactions volumes	Typically we receive about 30-40 calls per day with volumes increasing as property taxes become due and payable. (roughly 1,000 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• CATS (Delinquent Taxes and Penalties module)</li> <li>• LID</li> </ul> <p>The AVRS system retrieves information via parcel account number. An account number is identified the AVRS system, then calls CATS or LID to retrieve the information. The system also allows for requesting property tax statements. A file is created which then on a nightly basis will send a request to print statements. The statements are then provided to the Treasurers' Office each morning and the statements are mailed out.</p>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Customer phone-entry</li> <li>• Interfaces from CATS &amp; LID (see above)</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• AVRS provides statistical reports which allow for analysis of customer use.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Customers of Clark County</b>

## 5. Billing Schedule

Purpose/business processes (related to CATS)	<p><i>File name: Billing Schedule 2003.xls</i></p> <p>Used to track manual billing adjustments that LID system isn't able to track (used for audits). Also tracks appropriate bill dates and due dates for County Road Improvement District's as well as documents Interest and Penalty amounts.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	Excel
Transactions volumes	Clean Water Program @ 250 Per year, CRID tracking tool-20 (roughly 23 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• CWP input from CRID spreadsheets</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• CWP-input forms are received from GIS, CRID</li> <li>• Information relating to Interest and Penalties are taken from CRID reconciliation reports (another manual spreadsheet)</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Data Management</b>

## 6. Cashier Refunds

Purpose/business processes (related to CATS)	<i>File name: CashierRefunds.mdb</i> This database provides a method for the cashier to request a refund after receipting an 'overpayment' on a parcel in CATS.
Vendor-supplied or custom-developed?	Custom-built in-house
Database	Access97
Transactions volumes	Approximately 300+ checks annually (roughly 25 per month) Timing: Any time
Interfaces/exports	<ul style="list-style-type: none"> <li>Links to Admin Refund DB for batch processing and loading into Oracle AP for payment</li> </ul>
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>Receipted into CATS for a parcel payment, yet the check not for the exact amount. The difference is refunded.</li> <li>Cover page for each check request with parcel # detail and reason listed.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Cashiers</b> – Entering data (payee data and parcel #) for check payment

## 7. CATS – Annexation

Purpose/business processes (related to CATS)	This module tracks parcels that have been annexed by cities in order to properly distribute road property taxes. As part of the Distribution System, the logic looks for the parcel on the table – if it matches, then the road property taxes are distributed to the city instead of the county for current and delinquent year collections.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Over 250 parcels during high annexation periods; less than 10 during low annexation periods
Interfaces/exports	GIS CATS (Manual interface) to Taxroll (Finance)
Primary input forms/output reports	Input <ul style="list-style-type: none"> <li>Database is populated by a parcel listing from GIS by the Assessor staff</li> </ul> Output <ul style="list-style-type: none"> <li>Distributed road fund taxes</li> <li>Provides reports by annexation of parcels, taxes owing, current month collections, remaining to be collected</li> </ul>
Department with ownership	Treasurer, Assessor
Users (by role)	<b>Finance</b> <b>Land use</b> <b>GIS</b>

## 8. CATS – Annual Adjustment

Purpose/business processes (related to CATS)	The Annual Adjustment program in CATS is used to bring 5/6 of the county's parcels to market value each year. To determine the adjustments, we use several outside programs, such as Excel spreadsheets, Access databases (containing and combining data from the sales subsystem), and a vendor-supplied program called 'NCSS' (for statistical analysis).
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	These programs are run daily over a 2 month span of the year in preparation for establishing new market values.
Interfaces/exports	Export data from CATS for analysis using Quiz into: <ul style="list-style-type: none"> <li>• Excel</li> <li>• Access</li> <li>• NCSS</li> </ul>
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>• Data downloaded from CATS sales subsystem.</li> <li>• Reports are created in NCSS and from Excel merging data into an established form. Data from these reports is handwritten on an annual adjustment form that is manually entered into the CATS Annual Adjustment program to adjust values (by property type, NH, etc.)</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Appraiser</b>

## 9. CATS – Annual Assessment / Interim Commercial

Purpose/business processes (related to CATS)	Allow mass adjustments by neighborhood (NH) to the values of properties to be applied to the total land and/or total building values, based on type of property.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Varies, depending on number of properties requiring adjustment to arrive at market value (done once a year). Of the 18,000 active commercial parcels, 5,000 are adjusted using Interim Commercial each year. (roughly 417 per month)
Interfaces/exports	Does not interface with other external systems.
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>A handwritten form is generated and online screens are used to input the adjustment information into CATS.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Data is downloaded into Excel from the CATS sales subsystem. Using this data and NCSS the information is analyzed and reported.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Commercial Appraiser Specialist</b>

## 10. CATS – Board of Equalization (BOE)

Purpose/business processes (related to CATS)	Interfaces with CATS and tracks Board of Equalization petitions, correspondence and meetings. BOE is a separate department that was founded by the State. Data comes from CATS and the programs reside within the CATS framework.
Vendor-supplied or custom-developed?	Custom developed; part of CATS
Database	Mainframe
Transactions volumes	1000 petitions per user
Interfaces/exports	<ul style="list-style-type: none"> <li>Data is drawn directly from CATS. The BOE system is essentially a limited access module of CATS</li> </ul>
Primary input forms/output reports	Online screens and reports
Department with ownership	BOE
Users (by role)	<b>BOE staff</b>

## 11. CATS – Can / Sup (Assessment)

Purpose/business processes (related to CATS)	<p>This module allows the department to change values for prior assessment years. This program is integrated with the tax files. Technically, there is only one can/sup module in CATS for both Assessor and Treasury users.</p> <p>A supplemental is defined as tax added to the roll after the roll has been certified for a specific year, where as a cancellation is a reduction. The State of Washington does not allow edits to taxes—only edits to the values upon which the taxes are based.</p>
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	> 5,000 per year (roughly 417 per month)
Interfaces/exports	None
Primary input forms/output reports	Input <ul style="list-style-type: none"> <li>• Merge forms created in MS Word or generated from the PARIS system</li> </ul>
Department with ownership	Assessment and GIS & Treasurer's Office
Users (by role)	<b>Data Entry Support</b>

## 12. CATS – Can / Sup (Taxation)

Purpose/business processes (related to CATS)	<p>This module makes appropriate adjustments to the parcels/accounts for cancellations, segregations, combinations, and supplements resulting from assessment activity as well as allowable exemption programs. This programming involves Personal Property and Real Property. Some cancellation and supplement activity also affects fees and assessments. Currently under extensive reprogramming to accommodate new law.</p> <p>A supplemental is defined as tax added to the roll after the roll has been certified for a specific year, where as a cancellation is a reduction. The State of Washington does not allow edits to taxes—only edits to the values upon which the taxes are based.</p>
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Currently the Treasurer's Office processes over 6,000 each year. (roughly 500 per month) This will increase as the new law which took effect in 2003 goes into production in Clark County
Interfaces/exports	<p>Interfaces:</p> <ul style="list-style-type: none"> <li>• Current Year adjustments – Assessors Can/Sup data entry</li> </ul> <p>Exports:</p> <ul style="list-style-type: none"> <li>• Tax Receipting System</li> <li>• Monthly Tax Roll Reporting</li> <li>• Daily distribution</li> <li>• LID system as it relates to Clean Water Accounts</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Cancellation supplement forms from Assessors Office</li> <li>• Destroyed property forms</li> <li>• Elderly information forms</li> <li>• Business closure information forms</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• A journal is created which documents the activity in the system. This journal is reviewed by the Assessor and Treasurer daily. May also cause reason to generate a refund request which is manually created in another application.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Data Management</b> <b>Finance</b>

### 13. CATS – Characteristics

Purpose/business processes (related to CATS)	Provides input and maintenance capabilities for land and building information. It also calculates values for each based on a cost model approach. Values can be affected using indexes, flags and miscellaneous codes that are also maintained in this program. There are > 150,000 properties in Clark County. The property characteristics and values for these properties are maintained through CATS.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Roughly 500,000 transactions per year (roughly 41,667 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Sends/Receives building permit information from Tidemark Advantage</li> <li>• Sends data to Annual Adjustment Sales database</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Online screens and uploads are used to maintain the data. Values can be adjusted through online screens, the annual adjustment program (420 and 430) or batch re-costing (CAR).</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Residential Appraiser</b> <b>Commercial Appraisal Specialist</b>

## 14. CATS – Collections / Foreclosure

Purpose/business processes (related to CATS)	The Treasurer's Office performs appropriate collection activity on the accounts. This system is used to document appropriate collection processes and efficient links to the CUBS system.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	This is primarily an annual process with tasks being completed periodically throughout the year. Affects up to 2000 parcels per year (roughly 167 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>When year-end processing is being completed a job was established- ATX40110 which documents on each account that is in the foreclosure process. This job will review the status of all accounts to determine if the account falls within the guidelines of the RCWs to qualify for the foreclosure process. A separate file of foreclosure properties is sent to the vendor for tax statement generation which will identify for the customer those accounts that are in jeopardy of moving through the foreclosure process.</li> <li>(Export to Field Reports Reval system)</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Miscellaneous receipt information is used to document the foreclosure costs which are not billed in CATS.</li> <li>Quiz reports are run nightly which document paid receipts for those accounts in foreclosure to remove the 999 status on the account.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Certificates of delinquency and several quiz reports</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Delinquent Tax Collector</b> <b>Data Management</b>

## 15. CATS – Computer Assisted Recosting (CAR)

Purpose/business processes (related to CATS)	The Computer Assisted Recosting program in CATS is used to bring 1/6 of the county's parcels to market value each year. To determine the adjustments, we use several outside programs, such as Excel spreadsheets, Access databases (containing and combining data from the sales subsystem), and a vendor-supplied program called 'NCSS' (for statistical analysis).
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	These programs are run daily over a 2 month span of the year in preparation for establishing new market values.
Interfaces/exports	Export data from CATS for analysis using Quiz into: <ul style="list-style-type: none"> <li>• Excel</li> <li>• Access</li> <li>• NCSS</li> </ul>
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>• Data downloaded from CATS sales subsystem.</li> <li>• Reports are created in NCSS and from Excel merging data into an established form.</li> <li>• Data from these reports is put into spreadsheets and uploaded into the main system (by property type, NH, etc.)</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Appraiser</b>

## 16. CATS – Delinquent Interest and Penalty Calculations

Purpose/business processes (related to CATS)	This program calculates delinquent interest and penalty on delinquent property taxes, some assessments and fees. This is more of an automated function than a true subsystem.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Used daily by all cashiers as well as all customer service with joint lobby training used by customer service staff in Assessors Office also. Performed on an “as needed” basis as records are processed—similar to the exemption calculation for elderly taxes.
Interfaces/exports	Input: <ul style="list-style-type: none"> <li>• N/A—no systems feed info. to CATS</li> </ul> Output: <ul style="list-style-type: none"> <li>• Web page</li> <li>• AVRS</li> </ul>
Primary input forms/output reports	Data is computed by CATS, driven by the due date of the account as well as the type of account. Property tax statements as well as info seen on Web page, heard through AVRS System and seen on Receipting screens.
Department with ownership	Treasurer
Users (by role)	<b>All Treasurer's Office employees</b> <b>Title Company searchers</b>

## 17. CATS – Distribution

Purpose/business processes (related to CATS)	This module distributes payments received to the appropriate taxing district, appropriate parcel, and prepares the accounting journals. It stores the code district information and allocations to the jurisdictions. The Treasurer's receipts and LIDs are posted daily and the property taxes and REET are posted bi-monthly.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	425,000 + (roughly 35,416 per month)
Interfaces/exports	CATS Oracle FMS LID System Taxroll (Finance)
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>CATS Cash Receipting</li> </ul> Output: <ul style="list-style-type: none"> <li>Journals for Oracle FMS (one for Treasurer's Receipts, one for taxes, FP and REET, and one for LIDs)</li> <li>Journals for CATS (one for real property, FP and REET, and one for personal property)</li> <li>Journals for LIDS</li> <li>Taxroll file</li> <li>Reports for balancing</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Accounting</b>

## 18. CATS – Electronic Taxation

Purpose/business processes (related to CATS)	This module is used to create files for mortgage companies of the entire taxation database. Files are retrieved via an FTP process. Files include Assessments and Fees.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	All fields are in ASCII format.
Transactions volumes	10 FTP accounts per month
Interfaces/exports	A flat file of CATS taxation data is extracted and refreshed to the FTP site weekly. This file is extracted every weekend and represents the current tax status of the real property accounts as of the previous Friday. A file is also created for assessments and fees.
Primary input forms/output reports	N/A
Department with ownership	Treasurer
Users (by role)	<b>Data management</b>

## 19. CATS – Exception Item Processing (EIP)

Purpose/business processes (related to CATS)	This module performs a process that creates Exception Item Processing file for remittance processing activity. Also known as the “derog file.”
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Transaction volumes are not relevant to this module. This file is a common source that provides information to various parts of CATS.
Interfaces/exports	<ul style="list-style-type: none"> <li>All receipts, pending or complete from all receipting modules are pulled into a file which is then transferred to the remittance processor nightly. This allows the <b>remittance processor</b> to not process the transactions that have payments pending or associated with the account. The file is also available to all cashiers so that we limit the number of duplicate payments we receive thus limiting the number of refunds we have to complete.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Paid and pending receipts(automated)</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Export file to remittance network (automated)</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Remittance program assistant</b>

## 20. CATS – Fire Patrol Assessments

Purpose/business processes (related to CATS)	This program creates and collects fire patrol assessments as part of the property tax collection process. This assessment is tracked on the same reports and databases as property taxes and not the Local Improvement District database.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	N/A
Interfaces/exports	<ul style="list-style-type: none"> <li>• GIS receives file from DNR and loads it into CATS and into the tax statements program</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• DNR download</li> <li>• Manual input</li> <li>• The Quiz program identifies parcels that have fire patrol data included on Real Property tax statements.</li> <li>• Quiz report that is used for taxroll balancing</li> <li>• Reports for the State</li> <li>• Distribution to the State</li> </ul>
Department with ownership	Assessor/GIS/Treasurer
Users (by role)	<b>Accounting</b> <b>Information Services</b> <b>Data Management</b>

## 21. CATS – History

Purpose/business processes (related to CATS)	This module stores the history activities on each property, e.g., previous values, owners, recorded documents, etc. The information can be viewed in characteristics as well as the history program
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	22,849 records added per year (roughly 1,904 per month)
Interfaces/exports	N/A
Primary input forms/output reports	<p>Inputs:</p> <ul style="list-style-type: none"> <li>The information stored in this program is either data entered or automatically rolled into the program by certain batch updates to CATS. Transactions in CATS write both journal and history records based on activity of the program. In addition, history records may be added through online screens. These journal entries are written into the permanent record (CATS_HIST_DELT), as opposed to the CATS_REAL_JRNL, which has only a two-week lifespan.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Appraisers</b> <b>Clerks</b>

## 22. CATS – Levy Certification

Purpose/business processes (related to CATS)	This module calculates levies and tax rates. This program is integrated with the code districts database of CATS and the tax programs.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	There are approximately 230 districts tracked per year
Interfaces/exports	<ul style="list-style-type: none"> <li>None. Any data from the rate sheets is entered manually.</li> </ul>
Primary input forms/output reports	<p>Inputs:</p> <ul style="list-style-type: none"> <li>On-line screen data entry primarily from budgets submitted by taxing districts.</li> </ul> <p>Outputs/Reports:</p> <ul style="list-style-type: none"> <li>Various reports generated by CATS to verify levy calculations.</li> <li>Information is downloaded from CATS Certification in text format into MS Word. The data is reformatted in MS Word and imported into an Access database to generate merge letters. These merge letters are then mailed electronically (from the database) or in printed format to the various taxing districts.</li> </ul>
Department with ownership	Assessment and GIS/Treasurer(?)
Users (by role)	<b>Levy Specialist</b>

### 23. CATS – Personal Property

Purpose/business processes (related to CATS)	Two programs assist in the appraisal of all personal property. The mainframe portion of the program (CATS) is used to store general account information and values, while an Access database is used to calculate values and store all of the CATS information as well as detailed account information. Files for the general information of each account (owner, buyer, address, situs, etc.) are maintained by the Assessor's office. These files together with the cancellation and supplement files are integrated with the tax files.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Approximately 7,200 commercial, 400 farm and 1,000 utility accounts. 24,000 per year (roughly 2,000 per month)
Interfaces/exports	The CATS Personal Property module does <i>not</i> interface with the Access Personal Property database. It generates daily code district database reports, daily cancellation/supplement reports (used by the Treasurer), an assessment roll, and a tax roll.
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>Appraisers calculate values in the Personal Property Access database and print valuation notices from that database. These forms are used as a source document to enter total values by category into the CATS Personal Property database.</li> <li>New accounts, name and address changes are set up in the CATS Personal Property module. Source documents for these transactions are mostly supplied by the property owner.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Appraisers</b> <b>Data entry support</b> <b>Manager</b>

## 24. CATS – Real Estate and Mobile Homes Excise Tax

Purpose/business processes (related to CATS)	This program calculates excise tax on sale of real property (including Mobile Homes). It produces a report of the collection of such tax by fund. The database is purged nightly. <i>This process should also to be documented to include required enhancements.</i>
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Process over 20,000 excise per year (Real property and Mobile Homes) (roughly 1,667 per month)
Interfaces/exports	Tables are contained within the CATS system to assist with the receipting of excise taxes. It contains data such as code district and associated excise rate. Delinquent penalty and interest tables are also associated with this part of CATS.
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>Paper forms such as excise tax affidavits and supplements.</li> </ul> Output: <ul style="list-style-type: none"> <li>Daily report which is used to help distribute excise tax revenue. This report does not come near completing this process.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Tax Service Cashiers</b> <b>Treasurer's Finance Department</b> <b>Assessors Office</b> <b>Outside agencies for sales analysis.</b>

## 25. CATS – Real Estate & Personal Property Tax Bill Creation

Purpose/business processes (related to CATS)	This module facilitates creation of bills for the amount owing on each parcel/personal property account.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Roughly 14,167 per month
Interfaces/exports	<p>Interfaces:</p> <ul style="list-style-type: none"> <li>• Levy Certification</li> <li>• DNR Files</li> <li>• Certified Values</li> </ul> <p>Exports:</p> <ul style="list-style-type: none"> <li>• Electronic files for Mortgage Companies</li> <li>• Web data (Internet imaging system)</li> </ul>
Primary input forms/output reports	<p>Input forms:</p> <ul style="list-style-type: none"> <li>• All adjustments forms (can/sups)</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Tax Roll</li> <li>• Customer statement</li> </ul>
Department with ownership	Treasurer

## 26. CATS – Real Property

Purpose/business processes (related to CATS)	Stores general information of the property such as owner, buyer, mailing address, situs address, legal description, tax status, etc. The information is maintained by the Assessor and integrated with the tax programs.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Daily—difficult to quantify—about 200,000 per year. (roughly 16,667 per month)
Interfaces/exports	Output: <ul style="list-style-type: none"> <li>Exports data from CATS Real Property to the Tidemark Advantage Building Permit System.</li> </ul>
Primary input forms/output reports	Various paper forms (excise affidavits, correspondence, internal forms, etc.).
Department with ownership	Assessment and GIS
Users (by role)	<b>Data Entry Support</b>

## 27. CATS – Sales

Purpose/business processes (related to CATS)	Maintains sales information, including a snapshot of the characteristics of the property at the time of sale.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Approximately 23,310 documents/year (roughly 1,943 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Comps database (Access)</li> <li>• Annual Adjustment Sales database (Access)</li> <li>• Ratio Study spreadsheet (Excel)</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• On-line screens are used to enter sales information as shown on sales documents.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Data is extracted from the sales database regularly for the use analysis, research, etc. by our department, property owners and other taxing districts.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Residential Appraisers</b>

## 28. CATS – Segregations and combinations

Purpose/business processes (related to CATS)	Splits or combines properties. The program is integrated with the characteristics, SA and tax files.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Approximately 1,600 documents resulting in an unknown number of records. 5,000 parcels per year. (roughly 417 per month)
Interfaces/exports	None
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Using an Arc Info tool, the Land Records Technicians generate a source document that shows the parent parcel's size, ownership and value. The Land Records Technicians and appraisers hand write the corresponding information for the resultant parcels on to the form. This form is then used by the Data Entry Support, using online screens to enter the information into CATS.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Land Records Technician</b> <b>Data Entry Support</b>

## 29. CATS – Senior Exemption

Purpose/business processes (related to CATS)	Calculates and maintains senior exemption values for properties that qualify for the senior exemption program. This program is integrated with the characteristics and special assessment files. Values may be data entered, captured one parcel at a time or transferred in batch mode.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Approximately 6,000/year (roughly 500 per month)
Interfaces/exports	None
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Data is either entered using online screens or 'captured' from characteristics, SA and CATS Real, using a batch program.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Data is also transferred back to CATS Real using a batch program;</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Levy Specialist</b>

### 30. CATS – Special Assessment

Purpose/business processes (related to CATS)	Calculates and maintains special assessment values for properties that qualify for the special assessment (SA) program. SA is integrated with the characteristics program. Market values automatically transfer to this program, either one parcel at a time or in batch mode.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	There were approximately 6,900 applications filed in 2003 (roughly 575 per month)
Interfaces/exports	None
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Data is transferred into this program from characteristics, either one parcel at a time or in batch mode. Updates can also be performed using the 'Special Assessment Update' program (online screens).</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Data is transferred from this program to the CATS Real program in batch mode.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Program Coordinator</b> <b>Data Entry Support</b>

### 31. CATS – Tax Receipting

Purpose/business processes (related to CATS)	This module receipts payments from such bills, either through over-the-counter transactions, via the remittance processor, or a received by a mortgage company. This module will be directly impacted by the implementation of a new point-of-sale system which should go into production second quarter of 2004.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	Over the counter=30,000, Remittance Processor=275,000, Mortgage Files=120,000. (roughly 35,417 per month) This includes all types, Real Property, Personal Property, and Assessments.
Interfaces/exports	<p>Input – Over the counter:</p> <ul style="list-style-type: none"> <li>• Derog file</li> <li>• Interest and penalty calculations</li> <li>• Can/supp activity</li> <li>• Tax generation system</li> </ul> <p>Input – Remittance receipting:</p> <ul style="list-style-type: none"> <li>• All payments come directly from the remittance network and loaded directly into RCL with a flag noting they are remittance batches of payments to accommodate the necessary accounting entries.</li> <li>• Mortgage receipting files are received directly from the mortgage companies via FTP and loaded into RCL with a flag that they are mortgage companies to accommodate the necessary accounting entries.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Distribution</li> <li>• Fiscal receipting, which involves the transferring of payments or removal of payments for refunds.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Source documents with payment type.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Receipts</li> <li>• Proof journals</li> <li>• Extract journals.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Cashiers</b> <b>Remittance</b> <b>Loan Extraction Clerks</b> <b>Fiscal Cashier</b>

### 32. CATS – Tax Roll

Purpose/business processes (related to CATS)	<p>This CATS module tracks property tax levies, collections, cancellations and supplements by fund and by tax year. It generates reports that are used to balance back to the CATS parcel database.</p> <p>It recaps the tax levy, tax payments, cancellations and supplements for each month by fund by tax year. By fund, it shows the total tax billed (by year) and the monthly changes (payments &amp; adjustments) showing the remaining amount to be collected for each fund (by tax year).</p>
Vendor-supplied or custom-developed?	Program within CATS
Database	CATS (Mainframe)
Transactions volumes	<p>Real Property: Each Month. Volumes vary.</p> <p>Personal Property: Each Month. Volumes vary</p>
Interfaces/exports	<ul style="list-style-type: none"> <li>• Receipting System feeds payments into Tax Roll.</li> <li>• Cancellation/Supplements are fed into Tax Roll</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Tax Levy</li> <li>• Tax Receipts</li> <li>• Cancellation Supplement Forms</li> <li>• Query Fixes</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Tax Roll Report (greenbar paper report)</li> </ul>
Department with ownership	Treasurer
Users (by role)	<p><b>Accounting Assistant</b></p> <p><b>Data Management</b></p>

### 33. CATS / CUBS Comparison Tool

Purpose/business processes (related to CATS)	<p><i>File name: CATS_CUBS_XP.mdb</i></p> <p>CUBS tracks bankruptcies and delinquent accounts. This database is used to compare data (extracts) from both the CATS &amp; CUBS systems. There are 'flags' set in CATS for bankruptcy and delinquent accounts. Delinquent accounts are collected by County personnel as well as assigned to a collection agency. In both systems, these items are manually updated. This process is to aid in finding the differences that need to be fixed so that both systems are correct and match.</p>
Vendor-supplied or custom-developed?	Custom built in-house
Database	AccessXP
Transactions volumes	<p>Timing: Monthly.</p> <p>Volume: Approx 1,000-1,300 per month</p>
Interfaces/exports	<ul style="list-style-type: none"> <li>• Human input to 'flag' account (CATS) that reference bankruptcy, go to collections, and any updates.</li> <li>• Quiz download for CATS information.</li> <li>• Export from CUBS</li> <li>• There is a separate file from CATS that is used to load CUBS for larger blocks of data.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• File download from CATS</li> <li>• File download from CUBS</li> <li>• Import into Access which various reports are available- by tax type, year - differences/same</li> </ul>
Department with ownership	Treasurer
Users (by role)	<p><b>Collections specialist &amp; CUBS</b></p> <p><b>Data Mgmt, Posting payments &amp; QUIZ reports</b></p> <p><b>Temp help</b> (to confirm and explain the differences between the two systems).</p>

### 34. Certification Access Database

Purpose/business processes (related to CATS)	<i>Filename: atc120r1.mdb</i> Used by Levy Specialist to print value letters for taxing districts
Vendor-supplied or custom-developed?	Custom-built
Database	Access
Transactions volumes	Approximately 50 letters once per year
Interfaces/exports	<ul style="list-style-type: none"> <li>Information is downloaded from CATS Levy Certification in text format into MS Word. The data is re-formatted in MS Word and imported into this Access database to generate merge letters.</li> </ul>
Primary input forms/output reports	<p>Output:</p> <ul style="list-style-type: none"> <li>These merge letters are then mailed electronically (from the database) or in printed format to the various taxing districts.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Levy Specialist</b> <b>Data Information Systems Coordinator</b>

### 35. Cities Distribution

Purpose/business processes (related to CATS)	<p><i>File name: S:\Access\CashMgmtDB97_2002.mdb</i>  <i>File name: F:\Finance\Excel\Forms\cremit.xls</i></p> <p>The purpose of this system is to disburse funds to cities from property tax collections-this is not an interface it is a manual process. It is a two step process, daily information is entered into an Access database to distribute the larger cities and the second step is a monthly reconciliation in Excel that finalizes the distribution of the larger cities and prepares the monthly distribution for the smaller cities.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	Mainframe/Access database/Oracle/Excel
Transactions volumes	During April and May/October and November Vancouver, Washougal, Camas and Battle Ground receive funds daily. During all other times a year only Vancouver receives daily disbursements-all other districts receive funds twice a month. (roughly 25 per month)
Interfaces/exports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Daily – Reports are generated as output from the CATS Distribution module. Data from the reports is then entered into Cash Management database (Access) The Cash Management database creates a source document with the details entered into Oracle AP for disbursement.</li> <li>• Monthly – Reports from CATS Distribution, Oracle FMS, and District Court are used to prepare the final monthly reconciliation</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Reports used to enter information into Oracle AP and to mail to the cities.</li> </ul>
Primary input forms/output reports	Distribution of tax collections
Department with ownership	Treasurer
Users (by role)	<b>Finance</b>

### 36. Clean Water Program (CWP)

Purpose/business processes (related to CATS)	<p>Also known as the “Clean Water Fee database,” this is an Access database used to process fee information about clean-water eligible parcels sent from the GIS department. The application accepts the parcel ID and clean water type code, and processes it into a format that can be uploaded into CATS.</p> <p>The database is recreated each May. The Clean Water fees maintained in this database are constructed via input from CATS, Advantage and the GIS Impervious layer.</p> <p>The export tool is used to extract data from the Clean Water program, format and cross-reference the data, and generate the flat files that are sent to the LID system and to the vendor. This happens twice per year (one for each tax run).</p> <p>Note: Prior to uploading to LID, the data is imported into an Excel spreadsheet and an extensive QA check is performed. This step is important because it substantially reduces the number of errors (by about 80%).</p>
Vendor-supplied or custom-developed?	Custom-developed by GIS
Database	Access
Transactions volumes	200 – 500 per year (roughly 42 per month)
Interfaces/exports	<p>Import:</p> <ul style="list-style-type: none"> <li>• Weekly download from CATS by GIS staff</li> <li>• From GIS Layer imp2003par</li> <li>• From Tidemark Advantage</li> </ul> <p>Export:</p> <ul style="list-style-type: none"> <li>• Web interface <a href="http://nt04/npdes/disputes/index.cfm">http://nt04/npdes/disputes/index.cfm</a> (Clean Water Program Dispute Tracker) - allows disputes to auto-calculated fees.</li> <li>• Annual ASCII file to CATS</li> <li>• Treasurer LID (Dbase file twice per year)</li> <li>• Flat file to sent to print vendor</li> </ul>
Primary input forms/output reports	Process is automated from CATS, Advantage and GIS. Manual updates and corrections are done through a ColdFusion-based web application
Department with ownership	Public Works Water Quality Program
Users (by role)	<p><b>LID verification</b></p> <p><b>Public Works Dispute resolution fee recipient</b></p> <p><b>GIS IT services</b></p>

### 37. Clean Water Program Dispute Tracker

Purpose/business processes (related to CATS)	This web interface <a href="http://nt04/npdes/disputes/index.cfm">http://nt04/npdes/disputes/index.cfm</a> allows disputes to auto-calculated fees.
Vendor-supplied or custom-developed?	Custom-developed by GIS
Database	Javascript
Transactions volumes	Roughly 168 per month
Interfaces/exports	Import: <ul style="list-style-type: none"> <li>• From Clean Water Program</li> </ul>
Primary input forms/output reports	Process is automated from CATS, Advantage and GIS. Manual updates and corrections are done through a ColdFusion-based web application
Department with ownership	Public Works Water Quality Program
Users (by role)	<b>LID verification</b> <b>Public Works Dispute resolution fee recipient</b> <b>GIS IT services</b>

### 38. Collection Agency Payments

Purpose/business processes (related to CATS)	<i>File name: CCT mmm2.xls</i> Track payments received from Collection agency. mmm = Month
Vendor-supplied or custom-developed?	Custom-developed
Database	Excel
Transactions volumes	Approximately 30 transactions per month
Interfaces/exports	None
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>Paper forms from the Collection Agency that are returned with monthly payment.</li> </ul> Output: <ul style="list-style-type: none"> <li>Printout of data</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Delinquent tax collector</b> <b>Clean Water research coordinator</b>

### 39. Columbia Ultimate Business Systems (CUBS)

Purpose/business processes (related to CATS)	Columbia Ultimate Business Systems is a stand-alone collections module for clean water, personal property, lighting assessments, delinquent activities. The system is used to track delinquent personal property, mobile homes, clean water and lighting assessments, returned items and bankruptcies. We also use the system to generate collection letters.
Vendor-supplied or custom-developed?	We purchased CUBS from a third party vendor. This product has only minimal customization to accommodate the calculation of interest and penalties.
Database	Jbase
Transactions volumes	Personal Property: Twice a year. Volumes vary. Mobile Homes: Annually. Volumes vary. RID: Annually. Volumes vary. CWP: Annually. Volumes vary.
Interfaces/exports	<ul style="list-style-type: none"> <li>A Quiz report is generated in CATS to identify delinquent accounts meeting specific criteria. The names are reformatted, using a custom program created in Excel (CUBS Format Conversion Tool), and then the accounts are uploaded to CUBS. Currently a manual review is still being made in CUBS for each account to ensure the names are entered correctly.</li> </ul>
Primary input forms/output reports	File from CATS to Excel to CUBS.
Department with ownership	Treasurer
Users (by role)	<b>Collections Manager</b> <b>Collections</b>

#### 40. Columbia Ultimate Business Systems (CUBS) Format Conversion Tool

Purpose/business processes (related to CATS)	<p>This tool is used to convert the CATS/Quiz export file to the CUBS format.</p> <p>Custom program created to reformat the names. The naming convention used by CUBS requires the last name to be entered first, followed by a comma, then the first name and finally a middle initial, if any. The Excel program does not work for suffixes, (e.g., Jr., Sr., etc.). It also does not recognize how to handle a two-part surname, (e.g., St. John). The third problem we have is identifying how to handle an account that has both a business name and an individual's name.</p>
Vendor-supplied or custom-developed?	Custom-developed in-house
Database	Excel
Transactions volumes	<p>Personal Property: Twice a year. Volumes vary.</p> <p>Mobile Homes: Annually. Volumes vary.</p> <p>RID: Annually. Volumes vary.</p> <p>CWP: Annually. Volumes vary.</p>
Interfaces/exports	A Quiz report is generated in CATS to identify delinquent accounts meeting specific criteria. The names are reformatted, using a custom program created in Excel, and then the accounts are uploaded to CUBS. Currently a manual review is still being made in CUBS for each account to ensure the names are entered correctly.
Primary input forms/output reports	File from CATS to excel to CUBS.
Department with ownership	Treasurer
Users (by role)	<b>Collections Manager</b> <b>Collections</b>

## 41. Comps

Purpose/business processes (related to CATS)	<p><i>File name: v:\clarkgis\avdata\shapes\dbase\assrdb.mdb</i></p> <p>Used by the appraisal staff to locate comparable sales. Created by GIS, this Access database contains information from characteristics and the sales database. The PARIS system is used to track and manage appeals. COMPS is simply an analysis tool.</p>
Vendor-supplied or custom-developed?	Custom developed, VB and MapObjects (MO)
Database	Access.
Transactions volumes	All residential appraisers make heavy use of this product in the 4th quarter of each year. To a lesser amount the rest of the year. There are 23,310 sales per year. (roughly 1,942 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Quiz extract (There is no direct upload of data from or into CATS.)</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Import from Quiz</li> <li>• Manual entry</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Report to the BOE or home owner.</li> </ul>
Department with ownership	Assessor
Users (by role)	<p><b>Residential Appraisers</b></p> <p><b>GIS Analyst</b> – Primary programmer for this project</p>

**42. CRID 11 – 18**

Purpose/business processes (related to CATS)	The CRID files are used for the following purposes: <ul style="list-style-type: none"> <li>• To calculate Bond Interest for the current year.</li> <li>• To calculate Delinquent Interest and Penalty.</li> <li>• To create new CRIDs.</li> </ul>
Vendor-supplied or custom-developed?	Created in Excel to calculate the amount due for each CRID because CATS cannot perform this function.
Database	Excel
Transactions volumes	Each CRID once a month. (roughly 8 per month) (Approx 3 hrs per month if it goes right.)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Export to Billing Schedule spreadsheet</li> </ul>
Primary input forms/output reports	The following information is <b>manually entered</b> into the Excel Spreadsheet in order to perform the correct calculations. <ul style="list-style-type: none"> <li>• A Quiz report is generated for each CRID payment schedules.</li> <li>• A Quiz Report is generated for all of the transactions within each CRID.</li> <li>• A Quiz Report is run for all payments made within a specific month.</li> </ul>
Department with ownership	Treasurer
Users (by role)	

### 43. Customer Statement Request Tool

Purpose/business processes (related to CATS)	<i>File name: RequestCustomerStatements.mdb</i> Used when customers call in requesting address change, re-printed tax statements, deferral applications, etc.
Vendor-supplied or custom-developed?	Custom built in-house
Database	Access97
Transactions volumes	Limited usage so far—approximately 50 times per month. Expecting greater volume as more staff use this tool.
Interfaces/exports	ODBC link to CATS for Real Property Account #'s, Names and Addresses. Generally, An update process is run daily to pick up new and changed records.
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>• Phone call from Customers</li> </ul> Output: <ul style="list-style-type: none"> <li>• Re-print Tax Statement request</li> <li>• Change of Address forms (which go back to the Assessors Office to making the change)</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Back-office Tax Service staff</b> (personnel working the phones, but not the front counter)

#### 44. DC Sketch

Purpose/business processes (related to CATS)	DC Sketch is a program that is used to draw building footprints during the new construction assessment process.
Vendor-supplied or custom-developed?	Vendor-supplied
Database	Flat file
Transactions volumes	6000+ per year. (roughly 500 per month)
Interfaces/exports	Use Infomatik to convert drawings into a TIF image to be sent to GIS to be used in eProperty Card.
Primary input forms/output reports	Building department plans are used for input (look at plan submitted and draw into program); the result is a printout of the sketch and/or a saved file.
Department with ownership	Assessor
Users (by role)	<b>Drawers</b>

## 45. Debt Service System

Purpose/business processes (related to CATS)	This database tracks the County and Jr. Taxing Districts' debt. It contains tables for taxing districts and related overlapping districts with their Assessed Value.
Vendor-supplied or custom-developed?	Custom built in-house
Database	Mainframe
Transactions volumes	Approx. 75 Debt Issues outstanding. Generally payments are twice yearly (June and Dec).
Interfaces/exports	Exports files for Oracle FMS ADI
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Month-end (primarily in June &amp; Dec) Accounting Journals - JV, Treasurer Check (the money is wired to the Fiscal Agent or Trustee)</li> <li>• Yearly update of taxing district tables, overlapping districts and their Assessed Values from CATS, after certification.</li> <li>• Manual enter the activities from the Fiscal Agent and Trustee statements.</li> </ul> <p>Outputs:</p> <ul style="list-style-type: none"> <li>• Treasurer Check Journals (\$\$ are wired)</li> <li>• Journal Vouchers for accounting.</li> <li>• Underwriter's reports</li> <li>• Overlapping Debt reports</li> <li>• Annual Schedules</li> <li>• Information for Debt Levy calculations</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Asset/Liability Manager</b> <b>Accountant</b>

## 46. Department of Natural Resources (DNR) Database

Purpose/business processes (related to CATS)	<p><i>File name: DNRMaster.xls</i></p> <p>DNR is a database of the properties that are required to pay DNR fire patrol. GIS manages the DNR file and calculates the fee on affected parcels. The file is uploaded to CATS on an annual basis. Clean Water Fee is handled the same way.</p> <p>GIS maintains this database. They perform the upload that calculates the acreage based fee.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	SQL Server
Transactions volumes	Updated once per year. DNR drives the update process. 24,000 records.
Interfaces/exports	<ul style="list-style-type: none"> <li>• ASCII upload into CATS via an Excel formatting spreadsheet</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• DNR is supposed to provided yearly requests for changes to GIS, but doesn't.</li> <li>• Manual input from GIS staff</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• DNR spreadsheet for upload to CATS Fire Patrol Assessment module</li> </ul>
Department with ownership	Assessor
Users (by role)	<p><b>Data Manager</b></p> <p><b>GIS Analyst</b></p>

## 47. Department of Natural Resources (DNR) Spreadsheet

Purpose/business processes (related to CATS)	<p><i>File name: DNRMaster.xls</i></p> <p>This is a file downloaded from the GIS DNR SQL Server database. It feeds into Fire Patrol Payments in CATS. The file is uploaded to CATS on an annual basis. Clean Water Fee is handled the same way.</p> <p>GIS maintains this database. They perform the upload that calculates the acreage based fee.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	Excel
Transactions volumes	Updated once per year. DNR drives the update process. 24,000 records.
Interfaces/exports	<ul style="list-style-type: none"> <li>• ASCII upload from DNR database</li> <li>• Download into CATS Fire Patrol Assessment module</li> </ul>
Primary input forms/output reports	(see above)
Department with ownership	Assessor
Users (by role)	<p><b>Data Manager</b></p> <p><b>GIS Analyst</b></p>

## 48. Eagle Recorder

Purpose/business processes (related to CATS)	Document imaging and tracking. <a href="http://www.ecsplus.com/products/cris.html">http://www.ecsplus.com/products/cris.html</a> . The County currently uses Eagle CRIS+, but will soon upgrade to the newer version—Eagle Recorder. The Recorder application will interface with the POS application to provide payment processing. The Recorder application provides land record recording and document imaging for related legal documents.
Vendor-supplied or custom-developed?	Vendor –supplied
Database	Oracle
Transactions volumes	Each day, Land Records looks at all the deeds, contracts, fulfillments, and mobile home docs recorded the previous day. So it can vary from a few dozen to around 200, depending on recording volume. Researching individual docs probably happens a dozen times a day, with people looking for only one or two docs each time. (roughly 260 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>Internet Excise Tax Imaging application</li> </ul>
Primary input forms/output reports	Output: prints of scanned recorded documents
Department with ownership	Auditor
Users (by role)	<b>Land Records staff</b> – Daily research <b>Support Staff</b> – Research <b>Appraisers</b> – Occasional research <b>Public</b>

## 49. Field Reports New Construction

Purpose/business processes (related to CATS)	<i>File name: FieldReports-NC.mdb</i> This database is used to gather data from CATS and GIS to generate reports used for field inspections by the new construction appraiser.
Vendor-supplied or custom-developed?	Custom developed
Database	Access
Transactions volumes	Used yearly to generate reports for a 3 to 4 month period. Approximately 7,000 parcels/year). (roughly 583 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>Data is downloaded from CATS, using ODBC, into Access, and linked to GIS SQL server tables.</li> <li>Some of the data is downloaded from CATS using Quiz, saved into an Excel spreadsheet that is linked to the Access database.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>CATS interfaces (see above)</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>A form stored in Access is completed, indicating which reports should be generated. Onscreen data entry to generate paper reports.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Data Information Systems Coordinator</b> <b>Residential Appraiser</b>

## 50. Field Reports Reval

Purpose/business processes (related to CATS)	<i>File name: FieldReports-CYCLE1.mdb</i> Used for gathering data from CATS and GIS to generate reports used for field inspections by the reval appraiser.
Vendor-supplied or custom-developed?	Custom developed
Database	Access
Transactions volumes	Used yearly to generate reports for a 3 to 4 month period. Approximately 25,000 parcels/year. (roughly 2,083 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Data is downloaded from CATS, using ODBC, into Access, and linked to GIS SQL server tables.</li> <li>• Some of the data is downloaded from CATS using Quiz, saved into an Excel spreadsheet that is linked to the Access database.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• CATS interfaces (see above)</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• A form stored in Access is completed indicating which reports should be generated. Onscreen data entry to generate paper reports.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Data Information Systems Coordinator</b> <b>Residential Appraiser</b>

## 51. Financial Management System (FMS)

Purpose/business processes (related to CATS)	CATS interfaces with the Oracle FMS system to record receipts. Accounts receivable accounting entries are performed manually at year-end based upon reports from CATS.
Vendor-supplied or custom-developed?	Vendor (Oracle Financials)
Database	Oracle
Transactions volumes	425,000+ per year (roughly 35,417 per month)
Interfaces/exports	<p>CATS supplies three files from the Distribution Process to interface into Oracle FMS:</p> <ul style="list-style-type: none"> <li>• Property taxes (occurs bi-monthly)</li> <li>• Treasurer's Receipts</li> <li>• LID receipts.</li> </ul> <p>This process is run in the Treasurer's Finance department.</p>
Primary input forms/output reports	<p>Input</p> <ul style="list-style-type: none"> <li>• Files for receipts</li> </ul> <p>Output</p> <ul style="list-style-type: none"> <li>• The interface provides double entry accounting (CATS only provides single entry accounting)</li> <li>• Reports of revenues collected by fund</li> <li>• Online inquiry of tax collections by fund</li> <li>• Flexible reports</li> </ul>
Department with ownership	Treasurer
Users (by role)	

## 52. GIS

Purpose/business processes (related to CATS)	<p>GIS is responsible for maintaining the following fields in CATS:</p> <ul style="list-style-type: none"> <li>• Zoning</li> <li>• Lots foot</li> <li>• PUC Flag</li> <li>• GeoCode</li> <li>• City Limits</li> </ul> <p>GIS is used to cross-check the following fields:</p> <ul style="list-style-type: none"> <li>• Neighborhoods</li> <li>• Code Districts.</li> </ul> <p>GIS is used to calculate fees or taxes for:</p> <ul style="list-style-type: none"> <li>• Clean Water Fees</li> <li>• DNR Taxes</li> </ul> <p>GIS is currently developing processes for slopes and soils.</p> <p>(Note: ClarkView is a separate desktop GIS application that is independent of the exchange of GIS and CATS databases.)</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	The GIS program uses SQL Server and INFO.
Transactions volumes	Updates are driven by Assessment year for most layers. Segregations drive updates of Geocodes.
Interfaces/exports	<ul style="list-style-type: none"> <li>• CATS – Updates are currently accomplished through exchange of ASCII files. GIS does download some data from CATS using ODBC drivers. GIS Map layers drive these uploads. These uploads are fundamental to Assessment and Taxation.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• These are automated processes. Changes are reviewed as the results of changes to the CATS records. In the case of cross checking maps are added to ClarkView that show parcels affected, old value, new value.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Maps</li> <li>• Correction files for CATS</li> </ul>
Department with ownership	GIS
Users (by role)	<p><b>Public Internet users</b></p> <p><b>All internal departments</b></p>

<b>GIS Layers that provide primary input to CATS:</b>	<b>Layer</b>	<b>CATS data</b>	<b>Notes</b>
	Parcels	lot size	Used to overlay other layers: Zoning, slopes, soils, code districts
	Zoning		
	Code Districts	Code District layer is a composite of: cities, school districts, fire districts, cemetery districts, water districts, port districts, and annexations layers	
	Residential Neighborhoods	nbrhd	
	Commercial Neighborhoods	nbrhd	
	Soils	Current Use	
	Slopes	Current Use	
	Impervious	Clean Water Fees	
	Cites		
<b>GIS Applications that support Assessment</b>	<b>Application name</b>	<b>Platform</b>	
	Maps-OnLine (MOL)	Internet Mapping	parcel research/Taxes/Deeds
	MultiMap	Intranet Mapping	
	ClarkView	ArcView 3.2 Application	parcel research
	iMap	VB - MapObjects Application	parcel research/ Comparable Property Finder
<b>Image databases developed supported by GIS that relate to assessment:</b>	<b>Image Database</b>		<b>Notes</b>
Assessor	Building Photos		Images are all stored as files (not in database)
	Sketches (Building plans)		SqlServer databases are used to index images.
	Historic Building Cards		
Survey Office	ShortPlats/Subdivisions		
	Surveys		
Treasurers office	Excise Documents		
Community Development	As-builts		
	Site Plans		
<b>Assessment Plots and Reports</b>			
These are the major maps. There are literally about 100 maps available to the appraiser.	Neighborhood Maps	Variety of these	
	Field Maps	1500 - 2000 per year for assessment cycle	
	Comparable property maps		
	Segregation reports		
	Miscellaneous Code Reports		

### 53. Industrial Database

Purpose/business processes (related to CATS)	<i>File name: Indlst_2003.mdb</i> This Access database is used to track appraisal progress on industrial personal property returns
Vendor-supplied or custom-developed?	Custom-developed
Database	Access
Transactions volumes	Approximately 200 per year (roughly 17 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>Data is updated yearly by linking to the Personal Property Access database that contains the tables for personal property. Updates can also be done manually.</li> </ul>
Primary input forms/output reports	
Department with ownership	Assessment and GIS
Users (by role)	<b>Data Information Systems Coordinator</b>

## 54. Internet Excise Tax Affidavit Imaging

Purpose/business processes (related to CATS)	Intranet only – Pulls up scanned images of excise tax affidavit documents. Includes recorded deed. The web page will soon be upgraded, but will maintain the same basic functions. Primarily a customer service tool at this time.
Vendor-supplied or custom-developed?	Created by GIS
Database	SQL Server
Transactions volumes	Currently we process about 21,000 excise tax affidavits annually (roughly 1,750 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Cris+ system – affidavits are outsourced for scanning and indexing. The excise number is indexed at the time of outsourcing. This information is uploaded to the GIS intranet site, and tied to the Auditor's Internet piece for recording information.</li> </ul>
Primary input forms/output reports	<ul style="list-style-type: none"> <li>• Data is not entered into this system. It is view only.</li> </ul>
Department with ownership	Treasurer
Users (by role)	Assessors and Treasurer's staff

## 55. Internet Taxation and Lighting Assessment

Purpose/business processes (related to CATS)	This Internet tool allows the public and title companies to search on-line for Property tax and assessment related information. The web page will soon be upgraded, but will maintain the same basic functions.
Vendor-supplied or custom-developed?	Custom developed by GIS and IS
Database	SQL Server
Transactions volumes	Heaviest time for viewing is in tax time which would be April/May and October/November
Interfaces/exports	<p>These interfaces are a combination of Quiz extracts, ODBC links and COBOL reports:</p> <ul style="list-style-type: none"> <li>• CATS-related files (receipting activity, name and address changes, and penalty and interest calculations) are retrieved daily.</li> <li>• Yearly, the tax data is updated when taxes are generated. There are no systems that are fed information from this system</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Data is not entered into this system. It is a direct link from CATS that automatically updates this application.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Customers print screens to include with their property tax payments when they are unable to locate a bill generated by the Treasurer's Office.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<p><b>Taxpayers of Clark County</b>  <b>Mortgage companies</b>  <b>Title companies</b>  <b>Realtors</b></p>

## 56. Large Property Address List

Purpose/business processes (related to CATS)	<i>File name: lrgpropertaddress.xls</i>  This spreadsheet contains a set of address reference codes for large taxpayers. Property Owners with multiple parcels are able to send in a list of accounts for the Treasurer's Office to code similar to a mortgage company. The data contained on the lists are then manually added to CATS
Vendor-supplied or custom-developed?	Custom (Word mail-merge)
Database	Excel/Word
Transactions volumes	Two to three times a year
Interfaces/exports	Export mail merge letters used to manually code CATS parcels
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>• Manual input of lists received from Large Property Owners</li> </ul> Output: <ul style="list-style-type: none"> <li>• Excel/mail merge for letters</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Statement Loan Coder</b>

Purpose: The purpose of this list is to allow property owners who own large numbers of properties to receive all tax statements in one package. Rather than receive each bill in a separate envelope.

## 57. Levy Rate Sheet

Purpose/business processes (related to CATS)	<i>File name: 2003 Levy New.xls</i> This spreadsheet provides an individual breakdown of tax rate by district (based on code district)
Vendor-supplied or custom-developed?	Custom-developed
Database	Excel
Transactions volumes	Only a few times per year
Interfaces/exports	<ul style="list-style-type: none"> <li>• None</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Manual input based on certification report for levy rates by district received from Assessors office</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Levy rate sheet used by all members of Treasurer's Office, Assessors Office and public.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<p><b>Data Management</b> – They use it daily to re-check calculation of taxes on Cans/Sups adjustment on Real and Personal property taxes on the CATS.</p> <p><b>Finance department</b> – Distribution of taxes to the districts</p> <p><b>Tax Service</b> – Calculation of Advances for plats</p> <p><b>Customers</b> – Questions about the rate in the districts</p> <p><b>Title companies</b> – Proration of taxes on Sells.</p>

## 58. LID / Assessments and Fees System

Purpose/business processes (related to CATS)	The Local Improvement District is used to bill for such products as Lighting Assessments and Clean Water Program Fees. Used to document billing, receipting, collection, and distribution functions associated with assessments, that is, lighting, county road improvement districts, Clean Water, drainage, etc
Vendor-supplied or custom-developed?	Custom-developed by a vendor and in-house programming
Database	Mainframe
Transactions volumes	CWP-56,000, Lighting 35,000 all others combined @ 2000 (roughly 7,750 per month)
Interfaces/exports	<p>Interfaces:</p> <ul style="list-style-type: none"> <li>• CWP (Clean Water Program) – GIS department sends a file to a program associated with LID which takes the data and computes the fee, a file is created which is forwarded to the statement vendor for processing as well as the data is loaded into LID for inquiry and receipting.</li> <li>• Lighting – A file is received from Clark Public Utility that is loaded into LID, LID creates a file to be sent to the vendor for processing. Drainage Maintenance is hand entered into the system based on documentation provided by the vendor, Water Utility Districts: hand entered into the system based on documentation provided by Clark Public Utility CRID: hand entered into the system based upon documentation provided by district.</li> <li>• Land use – hand entered into system based upon information and documentation provided by Assessors Office.</li> </ul> <p>Exports:</p> <ul style="list-style-type: none"> <li>• No systems are fed information from this part of CATS</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Documentation is provided by GIS to adjust CWP billings</li> <li>• Documentation is provided by CPU for adjustments of Lighting accounts.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Billing statements</li> <li>• Reconciliation reports</li> <li>• Downloads of paid and unpaid accounts</li> </ul>
Department with ownership	Treasurer
Users (by role)	All Treasurers' Staff

## 59. List of Loan Companies

Purpose/business processes (related to CATS)	<i>File name: LoanList.mdb</i> This database contains a listing of the loan companies.
Vendor-supplied or custom-developed?	Custom
Database	Access97
Transactions volumes	N/A – by query
Interfaces/exports	<ul style="list-style-type: none"> <li>• Manual export used to verify the CATS loan list</li> <li>• Links to the Access Loan Refund Database.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Manually enter new loan companies for a loan number.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Loan list report for Treasurer's office</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Data Management</b> main users for loan coding into CATS and Loan processing in CATS

## 60. Loan Refund Processing

Purpose/business processes (related to CATS)	<p><i>File name: New Loan Refunds.mdb</i></p> <p>Handles the Loan Refund Process. It allows users to send overpayments back to the mortgage or loan servicing companies. When the loan refund batches are ready to be processed, the data is sent to the refund payments database to be included in the Oracle batch for the refund payment process.</p>
Vendor-supplied or custom-developed?	Custom built in-house
Database	Access97
Transactions volumes	<p>200-250 checks annually. (roughly 21 per month) Loan Company receipts into CATS 110,000+ in 2002.</p> <p>Timing: 3 times a year - End of April, End of July (CWP), and End of October</p>
Interfaces/exports	<ul style="list-style-type: none"> <li>• Admin. Refund DB for batch processing and loading into Oracle AP for payment</li> <li>• List of Loan Companies database</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Checks from Loan/Loan Serving Companies which are receipted into CATS.</li> <li>• CATS Proof reports of parcels paid (file loaded into CATS) -- Where duplicate payments are entered/loaded to DB.</li> <li>• Refund TR to remove \$ entered into CATS REPORTS: various Treasurer Receipts (TR's), mail merge letters</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Loan Specialist</b>

## 61. Microfiche Storage / Management System

Purpose/business processes (related to CATS)	Various processes in CATS produce microfiche output for archival purposes. Example: Annual Assessment in update mode, assessment rolls, valuation notices, prior year SA records
Vendor-supplied or custom-developed?	N/A
Database	Physical system
Transactions volumes	Varies depending on the number of transactions that occurred in the program that generates the microfiche.
Interfaces/exports	None
Primary input forms/output reports	CATS programs
Department with ownership	Assessor/Treasurer
Users (by role)	<b>All departments</b> <b>Public</b> <b>Title companies</b>

## 62. Miscellaneous Revenue Distributions

Purpose/business processes (related to CATS)	<i>File Name: F:\Finance\Excel\Levies\levy(yr).xls</i> This spreadsheet is used as a template to distribute property tax-like revenue e.g. landuse, DNR, federal forest, PILOT, etc.
Vendor-supplied or custom-developed?	Custom
Database	Excel spreadsheet
Transactions volumes	4-10 distributions a month
Interfaces/exports	<ul style="list-style-type: none"> <li>Report generated at certification provides levies by code district. This report is used to set up the levy template spreadsheet</li> </ul>
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>Report from certification</li> </ul> Output: <ul style="list-style-type: none"> <li>Fund transfer to be entered into ADI for FMS GL or manually enter the journal</li> </ul>
Department with ownership	Treasurer – Finance
Users (by role)	<b>Accounting</b>

### 63. Number Cruncher Statistical System (NCSS 2004)

Purpose/business processes (related to CATS)	NCSS is a third-party application used to develop statistical analysis reports (histograms, charts, ratios, levels of uniformity, etc.) for the Assessor's Department. It is primarily an ad hoc tool similar to Quiz. NCSS draws source data through Quiz
Vendor-supplied or custom-developed?	Vendor-supplied application
Database	N/A—runs against other databases
Transactions volumes	Residential – Used 2 days per week during 3-month period Commercial/Industrial – Used 2 days per week during 1-month period Multi-family – Used 3 days per week during 1-month period Misc. – Used 1 day per week during 12-month period
Interfaces/exports	Input: <ul style="list-style-type: none"> <li>Data from CATS through Quiz</li> </ul> Output: <ul style="list-style-type: none"> <li>NCSS results cut and pasted into Excel spreadsheets for further manipulation.</li> </ul>
Primary input forms/output reports	<ul style="list-style-type: none"> <li>Manual input</li> <li>Further manual input after data has been ported to Excel</li> </ul>
Department with ownership	Assessor (Currently have 4 licenses shared between Residential and Commercial departments)
Users (by role)	<b>Residential appraisers</b> <b>Multi-family appraisers</b> <b>Commercial/industrial appraisers</b> <b>Other appraisers</b>

## 64. Parks Real Estate Excise Tax (REET)

Purpose/business processes (related to CATS)	<p><i>File: G:Cathy\Excel\ParksREET.xls</i></p> <p>Park's REET is a record of funds to be distributed based up location of property not tied to code districts. Therefore, GIS is used to map the location of the real estate sales, CATS is used to identify what is to be distributed, a spreadsheet is used to distribute the fund based upon formulas, and manual journals are used for the accounting entries.</p> <p>This system does not track receipts—it merely calculates the taxes owing and produces reports on collections.</p>
Vendor-supplied or custom-developed?	Custom
Database	GIS, Excel, CATS
Transactions volumes	One a month
Interfaces/exports	<ul style="list-style-type: none"> <li>• GIS</li> <li>• CATS – REET collections</li> <li>• Oracle FMS</li> </ul>
Primary input forms/output reports	<p>Input</p> <ul style="list-style-type: none"> <li>• REET collections from CATS</li> <li>• Property sales by geographic location - GIS</li> </ul> <p>Output</p> <ul style="list-style-type: none"> <li>• Report summarizes distribution</li> <li>• Information for the manual journals</li> </ul>
Department with ownership	Treasurer – Finance
Users (by role)	<p><b>Accounting</b></p> <p><b>Land use</b></p>

## 65. PARIS

Purpose/business processes (related to CATS)	<p>PARIS is used to track communications with property owners. It is used to track information whenever a property owner, buyer or agent requests certain actions and information, for such activities as: a change of market value; a change of Special Assessment (Current Use) value; a change of property characteristics which results in a change of value; a change of new construction value; a property inspection for the purpose of correcting value and/or characteristics; or to send general information on their property, taxes or exemption programs.</p> <p>PARIS allows staff to follow through and track the request from its receipt to final disposition. It also stores all comments and work performed for each parcel. A history of all certified assessed values is kept and available to view. Typical contact is with a customer in our business lobby or from a telephone call. Some communications occur from postal mail, e-mail or fax.</p> <p>The program is linked to CATS and tracks all activities, comments and correspondence related to the inquiry. It also stores information on assessment notices mailed to property owners.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	FoxPro
Transactions volumes	Varies each year. For 2003 > 100,000 valuation notices were mailed. (roughly 8,333 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Interfaces with CATS Can/sup module to upload parcel and valuation data.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Manual input</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• We generate status reports, merge letters and forms from this database.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<p><b>Appraiser</b></p> <p><b>Support staff</b></p>

## 66. Personal Property Access

Purpose/business processes (related to CATS)	<p><i>File name: PersProp2005.mdb (Access front-end)</i>  <i>Location: Server NT20 PersonalProperty (SQL Server database back-end)</i></p> <p>This database is used to enter data (Commercial, farm, industrial, leased, and timber accounts) and print reports. It is also a tool to download data from CATS Personal Property into the back-end database.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	Access
Transactions volumes	There are approximately 7,200 commercial and 400 farm accounts
Interfaces/exports	<ul style="list-style-type: none"> <li>• Data is imported into the database from CATS Personal Property module and/or transferred from a prior year's Access database. Using an Access Project database, fields can be changed, added or deleted from this database.</li> <li>• Output to MS Access Industrial database</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Updates are performed through data entry using documentation supplied by property owners.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Clean-up reports, valuation notices, affidavits and various other reports are generated from this database.</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<p><b>Data Information Systems Coordinator</b></p> <p><b>Appraiser</b></p>

## 67. Personal Property Discovery

Purpose/business processes (related to CATS)	<p><i>File name: Discovery.mdb</i></p> <p>This database is used for the discovery of new, commercial personal property accounts. It contains the following information:</p> <ul style="list-style-type: none"> <li>• Business and/or Business Owner Name</li> <li>• Mailing Address</li> <li>• Telephone number</li> <li>• UBI (Unique Business Identifier) Number</li> <li>• Date the business opened</li> <li>• Date the business closed</li> </ul> <p>The information in this database is updated and the resulting information is compared to the active personal property file. Entries that do not find a match in the active personal property database are considered to be “potential new personal property accounts”.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	Access
Transactions volumes	~35,000 records per month
Interfaces/exports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Datafile received yearly from State DOR showing all businesses (based on business license activities for the preceding year)</li> <li>• Datafile received monthly from Auditor’s office showing all businesses paying sales tax to Clark County.</li> </ul> <p>The files are consolidated into one table, then duplicates are eliminated by UBI number. The result is a</p> <p>An extract is then taken from the SQL Server table behind the Personal Property Access database. A comparison is run between the two tables, and duplicates are again</p> <p>The result is a list of potential new personal property accounts.</p>
Primary input forms/output reports	<p>Output:</p> <ul style="list-style-type: none"> <li>• Softcopy exception report table</li> </ul>
Department with ownership	Assessor
Users (by role)	<p><b>Data Management</b></p> <p><b>Program Coordinators</b></p>

## 68. Petition and Extraction Refunds

Purpose/business processes (related to CATS)	<i>File name: dbfrndpr97.mdb</i> This database is used to enter Refund information (Petitions & Extractions).
Vendor-supplied or custom-developed?	Custom built in-house
Database	Access97
Transactions volumes	For both types of refunds: <ul style="list-style-type: none"> <li>• Annual Volume: 2002 = 1,000+ checks 2003 looks like about 1,100 checks</li> <li>• Min month – 20</li> <li>• Max month – 180</li> <li>• Timing – larger swings for several months following when taxes are due.</li> </ul>
Interfaces/exports	<ul style="list-style-type: none"> <li>• Links to the Admin Refund database for batch processing and loading into Oracle AP for payment</li> </ul>
Primary input forms/output reports	<p>Input, Petition Refunds:</p> <ul style="list-style-type: none"> <li>• <b>Changes in Assessment - From Assessors</b> resulting in change in Taxes</li> <li>• <b>Petition request forms</b> - signed and returned by the customer.</li> </ul> <p>Input, Extraction Refunds:</p> <ul style="list-style-type: none"> <li>• <b>CATS proof reports from remittance Processor batches (extractions)</b> - Duplicate payment record is deleted from batch and this duplicate parcel information is entered into Refund DB.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• Various Treasurer Receipts</li> <li>• Batch summary reports</li> <li>• Mail merge letters</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Refund Specialist</b>

## 69. Point of Sale

Purpose/business processes (related to CATS)	
Vendor-supplied or custom-developed?	
Database	
Transactions volumes	•
Interfaces/exports	•
Primary input forms/output reports	•
Department with ownership	
Users (by role)	

## 70. Quiz (Cognos)

Purpose/business processes (related to CATS)	Quiz is a Cognos product used for ad hoc reporting. Using ODBC and report writers, we are able to access all information stored in CATS and download the information for analysis and checking processes. Information can be accessed using selection criteria or parcel number lists.
Vendor-supplied or custom-developed?	Vendor supplied – Cognos Quiz application
Database	Points to mainframe
Transactions volumes	Approximately 3,000 quiz reports exist. About 50% of those reports are used regularly.
Interfaces/exports	<ul style="list-style-type: none"> <li>Data is downloaded into Excel or Access for further manipulation.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Manual queries</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Majority of the information is downloaded into Excel spreadsheets or Access.</li> <li>Paper reports printed on greenbar are also used.</li> </ul>
Department with ownership	Assessor/Treasurer
Users (by role)	<p><b>Data Information Systems Coordinator</b> – Writes quiz reports to download data for appraisal support (analysis), requests for information from the public, and other projects as needed.)</p> <p><b>Program Coordinator</b> – Writes quiz reports to download data for the Levy Specialist, appraisal support, and verification of data accuracy in CATS.)</p> <p><b>Data Information Systems Coordinator</b> – Downloads data from the CATS Personal Property database into an Access database for processing of personal property assessments.)</p>

## 71. Ratio Study Macro

Purpose/business processes (related to CATS)	<i>File name: G:\State Ratio\State header – Bills Thing.xls</i> Excel macro to assist with analysis of IOP sales for appraisal sales analysis.
Vendor-supplied or custom-developed?	Custom-developed
Database	Excel
Transactions volumes	Used 20 to 30 times a year (roughly 3 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>Data is downloaded into a pre-formatted Excel spreadsheet from the CATS Sales subsystem and/or Characteristics subsystem for 'combination' of characteristics and values for sales analysis.</li> </ul>
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>Manual input</li> </ul>
Department with ownership	Assessment and GIS
Users (by role)	<b>Appraiser</b>

## 72. RCL System

Purpose/business processes (related to CATS)	The RCL System is used to import information from both the remittance processor and loan companies via input files. The information is put into the RCL system for proofing before being transferred into the receipting system.
Vendor-supplied or custom-developed?	Part of CATS (custom)
Database	Mainframe
Transactions volumes	These programs run daily processing all transaction from the remittance processor and the loan companies. Remittance Processor = 275,000, Mortgage Files = 120,000.
Interfaces/exports	<p>Inputs</p> <ul style="list-style-type: none"> <li>• On-line Modifications</li> <li>• Remittance Processor</li> <li>• Loan Company Files</li> </ul> <p>Outputs</p> <ul style="list-style-type: none"> <li>• Batch Proof Reports</li> <li>• Batches Extracted into the RC database (Receipting System)</li> </ul>
Primary input forms/output reports	<ul style="list-style-type: none"> <li>• Batch Proof Reports</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Remittance</b> <b>Loan Extraction Clerks</b> <b>Fiscal Cashier</b>

### 73. Remittance Processor

Purpose/business processes (related to CATS)	This system allows for Receipting of all property tax payments that have been mailed in, provided a statement is included with payment. This is also the mechanism used to receipt statements received from 1 <sup>st</sup> Independent Bank (Pay Stations)
Vendor-supplied or custom-developed?	Supplied by Wausau Financial Systems
Database	FoxPro
Transactions volumes	Approximately 300,000 receipts annually (roughly 25,000 per month)
Interfaces/exports	<ul style="list-style-type: none"> <li>• Exception Item processing file received from CATS daily after nightly distribution occurs.</li> <li>• File sent to County daily of accounts that have been paid and should be proofed and extracted. Batches loaded into RCL for proof and post process.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>• Remittance system must have payment coupon to be processed.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>• File of batches to be loaded into RCL</li> <li>• Images of checks and stubs which are retained on Remittance network</li> <li>• Electronic files which document which type of account has been paid</li> <li>• Batch files are transferred to CATS from Remittance network via ftp process.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Remittance Program Assistant</b> <b>Tax Service Representative</b>

## 74. Suspense Fund 8751, 8755, 8757, 8758

Purpose/business processes (related to CATS)	<p>8751 – Used to reconcile suspense account 8751 for Land Use payments, bankruptcy payments, DNR/State Receipts, refund levy and foreclosure suspense. As payments are being applied (prior to application) receipted into a suspense account. As payments are disbursed payments removed from suspense account.</p> <p>A suspense fund is an account which carries charges or credits temporarily, pending the determination of the proper account or accounts to which they are to be posted.</p> <p>8755 – Used to reconcile suspense account 8755 for advance payments of Real and Personal Property to include Mobile Homes. As payments are being applied (prior to application) receipted into a suspense account. As payments are disbursed payments removed from suspense account.</p> <p>8757 – Used to reconcile suspense account 8757 for collection related fees such as foreclosure fees.</p> <p>8758 – Used to reconcile suspense account 8758 for remittance extractions, loan extractions, misc. payments, Clean Water collection payments, transfer payments. As payments are being applied (prior to application) receipted into a suspense account. As payments are disbursed payments removed from suspense account.</p>
Vendor-supplied or custom-developed?	Custom developed, built in house
Database	Excel
Transactions volumes	Depending on the time of year the volume is very large. The volume dramatically increases in April and October with tax payment processing.
Interfaces/exports	<ul style="list-style-type: none"> <li>The interface is with FMS GL.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Misc. receipt source documents known as TR's</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Reports would be a printout of spreadsheet.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>All of Treasurer's Office</b> – Reconciliation occurs in Finance area of Treasurer's Office, research completed by Tax Service.

## 75. Sympro

Purpose/business processes (related to CATS)	SymPro is an investment tracking program for the County's investments and our general investment pool. The distributions of property taxes from CATS is one of Clark county's largest source of funding for this pool. Any surplus cash (available cash greater than daily expenditures) in the County funds and junior taxing district funds are automatically invested in this pool.
Vendor-supplied or custom-developed?	Vendor-supplied
Database	Visual FoxPro and supplemental Access front-end
Transactions volumes	Volume: On a daily basis, depending on the funds cash need/surplus, the number of funds requiring investment ranges from a low of 5 and a high of 35 (roughly 540 per month).
Interfaces/exports	<ul style="list-style-type: none"> <li>Access is connected via ODBC link to Sympro for purposes of data input, reporting, and specific accounting requirements. One of the requirements is generating a flat file for import into FMS-GL to record the investment activities for the day.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Treasurer Operations of Cash (TOC) cash report (Explanation: <b>Taxes Collected and distributed in/by CATS</b> is imported to the Oracle GL. An Oracle cash summary activity reports from Oracle is one of the source documents for TOC. When all cash activity has been entered, a TOC report showing cash balances (both positive and negative) by fund is printed. Any surplus cash is invested in the pool where a cash deficiency requires a portion of their investments to be sold.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Asset/Liability Manager</b> <b>Accountant</b>

## 76. Tax Roll Balancing

Purpose/business processes (related to CATS)	<i>File name: TAXBAL2003.xls (Main File)</i>  This spreadsheet is used to balance the Tax Roll against the CATS Database. This is needed because the Tax Roll is fund-driven and the CATS database is code district driven.
Vendor-supplied or custom-developed?	Custom Report created in Excel
Database	Excel
Transactions volumes	Real Property Volumes: vary each month Personal Property Volumes: vary each month
Interfaces/exports	<ul style="list-style-type: none"> <li>• <b>None</b>—Quiz Reports are generated from CATS to identify all payments made by type, Cancellation Supplements by year and all ending balances by type. These figures are <b>manually entered</b> into the Excel Spreadsheet.</li> </ul>
Primary input forms/output reports	Input: <ul style="list-style-type: none"> <li>• 11 reports from CATS each month + Tax Roll Report is manually entered into Excel to balance the two types of information from CATS.</li> </ul>
Department with ownership	Treasurer
Users (by role)	<b>Finance Manager</b> <b>Finance</b>

## 77. Tidemark Advantage

Purpose/business processes (related to CATS)	Tidemark's Advantage application manages all the permitting activities for the City Vancouver's and Clark County's Building and Planning departments. CATS is updated nightly with building permit information for permits issued by the City of Vancouver and Clark County. Permit information is stored in characteristics. The Tidemark parcel, address and ownership files are updated from CATS nightly.
Vendor-supplied or custom-developed?	Vendor-supplied (Tidemark)
Database	Oracle
Transactions volumes	Unknown
Interfaces/exports	<p>Input:</p> <ul style="list-style-type: none"> <li>Nightly update from CATS Real Property module (parcel, address, ownership, etc.) Ad hoc update directly from GIS for environmental constraints, code districts and TIFs)</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Export of permitting activity to CATS Characteristics module</li> </ul> <p>Note: Temporary parcels are held in Tidemark until the real parcels are created in CATS and can be cross-referenced.</p>
Primary input forms/output reports	N/A
Department with ownership	Building & Planning/Assessment and GIS
Users (by role)	<b>Support Staff</b>

## 78. Top 10 Taxpayers

Purpose/business processes (related to CATS)	<p><i>File name: V:\clarkgis\avdata\shapes\dbase\Top100.mdb</i></p> <p>This database is used by the Levy Specialist to determine the top taxpayers in Clark County or any of its taxing districts. This is an Access database created and maintained by GIS.</p>
Vendor-supplied or custom-developed?	Custom-developed
Database	Access
Transactions volumes	Requires about 80 hours of work in early January. Reports may be requested throughout the year.
Interfaces/exports	<ul style="list-style-type: none"> <li>This is a tool that is fed information from CATS on an annual basis. January 1. It is then used throughout the tax year.</li> </ul>
Primary input forms/output reports	<p>Input:</p> <ul style="list-style-type: none"> <li>Manual data-entry form for establishing the same owner for many properties, or aliases for property owners. The primary interface is a VB application that assists in finding property owners with similar names.</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>The primary output reports is the report top tax payers by taxing districts</li> </ul>
Department with ownership	Assessor
Users (by role)	<b>Administrative Support Staff</b> <b>GIS analyst</b>



**APPENDIX D – MAINFRAME DATA  
ARCHITECTURE**

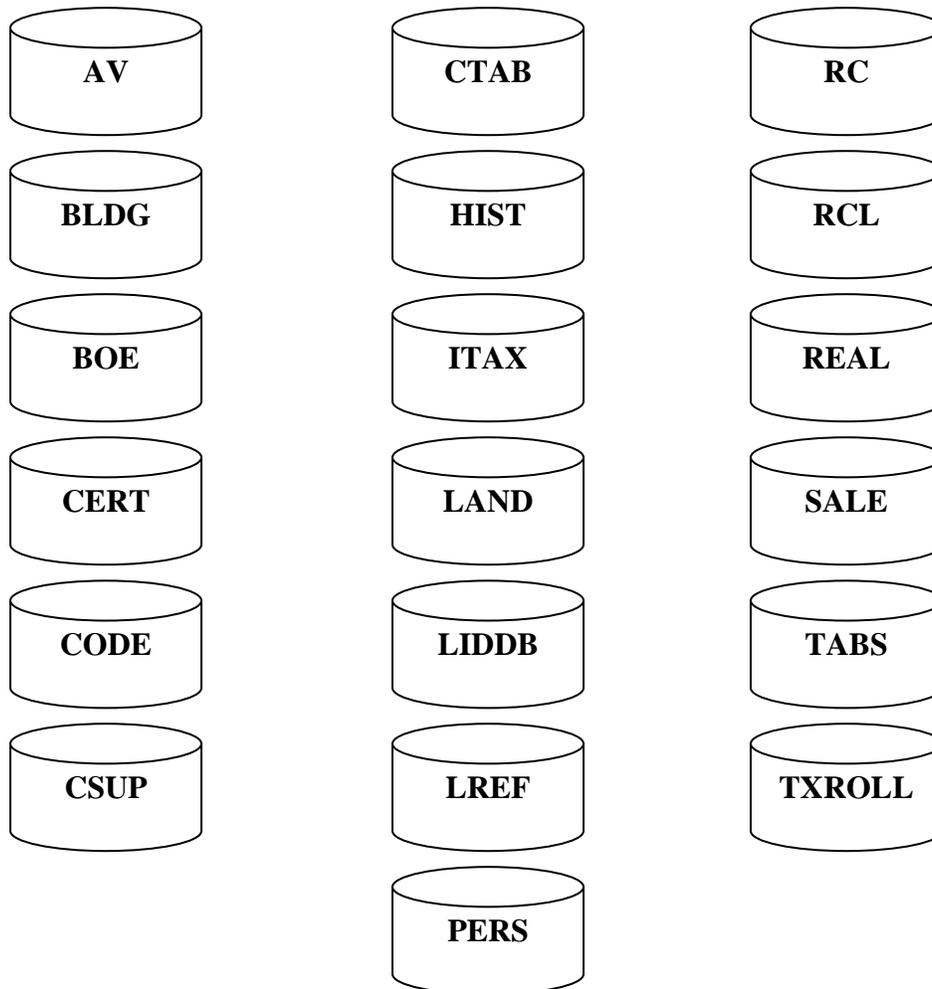
**CLARK COUNTY ATS RFP PROJECT**

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**Overview**

Currently, the CATS system utilizes data structures proprietary to the HP minicomputer system with addition third party indexing products to enhance the retrieval process. The bulk of the data is stored in TurboIMAGE structures. The block diagram below represents the databases.



Note: This representation may appear to be different than titles found in the Systems Overview document (Appendices A and B). The difference between the two is that the system overview is written from the subsystem standpoint/user perspective whereas this document represents the actual data storage areas and names. A subsystem generally encompasses or interacts with more than one database or file system.

**AV**

Information need to maintain assessed value information for elderly taxpayers

CATS-AV-APPL .....	Application record
CATS-AV-BASE-FRZ .....	Summarized value records
CATS-AV-COMMENT .....	Comment records
CATS-AV-FACTOR .....	Adjustment factor records
CATS-AV-INDICATED .....	Indicated value record
CATS-AV-JRNL .....	Transaction journal record
CATS-AV-MARKET .....	Market value records by year
CATS-AV-INCOME .....	Income amount record

**BLDG**

Building attributes related to a parcel includes summarized and specific detail records for residential buildings, outbuildings, multi-family complex, condominium, service stations/carwash, commercial income and market

CATS-REAL-CHAR .....	Summarized structure information
CATS-REAL-BLDG .....	Residential building characteristics data
CATS-REAL-OUTB .....	Out building data
CATS-REAL-CM-BLD .....	Commercial building data
CATS-REAL-CM-INC .....	Commercial income data
CATS-REAL-CM-SEC .....	Commercial building section data
CATS-REAL-CM-LMP .....	Commercial lump sum data
CATS-REAL-CM-RNT .....	Commercial rent data
CATS-REAL-CN-CPX .....	Commercial complex data
CATS-REAL-MF-CPX .....	Commercial multi-family complex data
CATS-REAL-MF-RNT .....	Commercial multi-family rent data
CATS-REAL-CN-MKT .....	Commercial condominium data
CATS-REAL-SV-STN .....	Service station/carwash data
CATS-REAL-SV-TNK .....	Service station tank data
CATS-REAL-CM-FF .....	Commercial floor footage data
CATS-REAL-MHDETL .....	Mobile home structure data

**BOE**

Data storage area for Board of Equalization information

BOE-MASTER .....	Appeals information
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**CERT**

Process area used to hold summarized assessed value information during the certification process

CATS-MAGENCY.....Master agency records  
 CATS-MFUND.....Fund number records  
 CATS-CERT-CD.....Code district records  
 CATS-CERT-AGENCY.....Detailed agency records  
 CATS-CERT-FUND.....Detailed fund records  
 CATS-CERT-CDINFO.....Code district information records  
 CATS-CERT-CR.....Code district millage information  
 CATS-CERT-CDD.....Code district value information

## CODE

Code district summary information including millage rates

CATC-ABAR.....General fund numbers  
 CATS-CODE-ASSR.....Summarized value information by district  
 CATS-CODE-TREA.....Summarized tax information by district  
 CATS-CODE-FUND.....Fund information  
 A-CATS-GLNO.....Mapping information into FMS  
 A-FMS-GLNO.....Mapping information into FMS  
 CATS-GL-MAP.....Mapping information into FMS

## CSUP

Cancellation/supplement information used to balance taxroll to actual receipting transactions

CATS-CSUP-DETL.....Cancellation/supplement changes

## CTAB

Tables for market calculation, annual adjustment and computerized appraisal recheck and more

CATS-TABS-LRAR	CATS-TABS-BSRT	CATS-TABS-ROOF
CATS-TABS-FLOOR	CATS-TABS-HEAT	CATS-TABS-FIX
CATS-TABS-BI	CATS-TABS-FIRE	CATS-TABS-PBSMT
CATS-TABS-GAR	CATS-TABS-PAT	CATS-TABS-POOL
CATS-TABS-COND	CATS-TABS-DEPR	CATS-TABS-LOCM
CATS-TABS-LCODE	CATS-TABS-ECODE	CATS-TABS-ACODE
CATS-TABS-FLAGS	CATS-TABS-TRANS	CATS-TABS-APPR
CATS-TABS-ABBR	CATS-TABS-BLD-AB	CATS-TABS-BOOTH
CATS-TABS-FENCE	CATS-TABS-GRM	CATS-TABS-H-C
CATS-TABS-HC-ABR	CATS-TABS-HEIGHT	CATS-TABS-KTCHN
CATS-TABS-PERIM	CATS-TABS-SS-ABR	CATS-TABS-TANKS
CATS-TABS-TNK-AB	M-BUILD-TYPE-ABB	M-COMM-ABBRE

M-COMM-AIRCOMP-K	M-COMM-BASEFL-KE	M-COMM-DEPR-KEY
M-COMM-ELEV-KEY	M-COMM-LOCAL-KEY	M-COMM-MAINFL-KE
M-COMM-MEZZ-KEY	M-COMM-SPKL-KEY	M-COMM-SS-CW-KEY
M-CURR-YEAR-KEY	M-H-C-ABBR	M-SS-CW-ABBR
M-STORY-HITE-KEY	M-TANK-ABBR	M-UNIT-IN-PLACE-
CATS-TAB-HC-AB-D	CATS-TAB-TNK-A-D	CATS-TABS-ABBR-D
CATS-TABS-AIRC	CATS-TABS-BASE	CATS-TABS-BD-ABR
CATS-TABS-BTHS-D	CATS-TABS-C-DEPR	CATS-TABS-C-LCL
CATS-TABS-CURR	CATS-TABS-CW-ABR	CATS-TABS-ELEV
CATS-TABS-GRM-D	CATS-TABS-H-C-D	CATS-TABS-HITE-D
CATS-TABS-MAIN	CATS-TABS-MEZZ	CATS-TABS-PRIM-D
CATS-TABS-SPKL	CATS-TABS-SS-CW	CATS-TABS-TANK-D
CATS-TABS-UNIT	M-NEIGHBORHOOD	CATS-TABS-NH-GRP
M-COMM-FLAG-KEY	CATS-TABS-MAN-FL	CATS-LAND-ACRE
CATS-LAND-TYPE	CATS-TABS-COMM-M	CATS-TABS-LSQF-M
CATS-TABS-OUT-M	CATS-TABS-OUTB-M	CATS-TABS-REST-M
M-LAND-TYPE-ALPH	M-LAND-TYPE-NUM	M-OUTBUILDING-TY
CATS-LAND-TYPE-D	CATS-TABS-LD-ACR	CATS-TABS-LSQF-D
CATS-TABS-OUT-D	CATS-TABS-OUTB-D	CATS-TABS-REST-D
CTAB-LAND-MISC-M	CTAB-LAND-MISC-D	CTAB-LAND-VALADJ
CTAB-CAR-LVPLAT	CTAB-CAR-LVAC-M	CTAB-CAR-LVAC-D
CTAB-CAR-SQAC-M	CTAB-CAR-SQAC-D	CTAB-CAR-RESIND
CTAB-MH-BSRT	CTAB-MH-FLOOR	CTAB-MH-ROOF
CTAB-MH-HEAT	CTAB-MH-APPL	CTAB-MH-FIRE
CTAB-MH-DEPR	CTAB-MH-SKIRT	CTAB-MH-AWNING
CTAB-MH-FOUND	CTAB-MH-FLOAT	CTAB-MH-PILING
CTAB-MH-MISC	CTAB-MH-XWALL	CTAB-MH-FIX
CTAB-MH-RI	CATS-TABS-APR-PW	CTAB-MH-COND
CATS-TABS-T-BSRT	CATS-ADJCND	CATS-CGRM-M
CATS-CGRM-D	CATS-TABS-PL-MIN	

**HIST**

Transaction journaling and change history

CATH-ACCT.....Serial number and last transaction date  
 CATS-HIST-DETL.....Historical changes  
 CATS-REAL-JRNL.....Daily transaction journaling

**ITAX**

Tax data for interfacing the counties website

TAX-DATA.....Specific tax information by account number

**LAND**

Land attributes related to a parcel, includes summary and specific detail records for homesite, land acres, easements, sqft and miscellaneous data

CATS-REAL-LAND .....Summarized land information  
 CATS-REAL-HSITE .....Homesite data  
 CATS-REAL-ACRES .....Acreage data  
 CATS-REAL-EASE .....Easement data  
 CATS-REAL-SQFT .....Square foot data  
 CATS-REAL-MISC .....Miscellaneous data

## **LIDDB**

Local improvement district account information

LID-MASTER .....Master record of lid types  
 ACCT-MASTER .....Master account records  
 BILL-MASTER .....Bill and receipt code information by lid type  
 BATCH-INFO .....Batch header information  
 ENTRY .....Data entry area for online program  
 TRAN-RECORD .....Transaction records related to a batch  
 LOAN-COMPANY .....Loan company information specific to lids

## **LREF**

Data structure used to provide batch input for loan reference information

BATCH-INFO .....Batch header information  
 LREF-TRAN.....Account and loan reference information

## **PERS**

Personal property account information

CATS-PERS-ACCT .....Owner, buyer, address information  
 CATS-PERS-FARMAV .....Assessed farm value for the current year  
 CATS-PERS-COMMAV .....Assessed commercial value for current year  
 CATS-PERS-CFDETL.....Detailed item value information  
 CATS-PERS-TAX.....Tax billing information  
 CATS-PERS-RCT .....Tax receipting information  
 CATS-PERS-SUPP .....Supplemental tax information  
 CATS-PERS-SRCT .....Supplemental receipt information  
 CATS-PERS-CANC .....Cancellation information  
 CATS-PERS-JRNL .....Transaction journaling

## **RC**

Real, personal property, lid and excise daily receipting information

OPERATORS .....Valid operators table  
 OPER-DATE .....Batch header table  
 RCT-DETL .....Batch detail record  
 REVERSAL.....Batch detail record  
 SPEC-DEP .....Batch detail record  
 DEROG-MASTER .....Remittance processor information

## **RCL**

Loan company and remittance processor daily receipting input area

OPERATORS .....Valid operators table  
 BATCH.....Batch header table  
 RCL-TRAN.....Batch detail record

## **REAL**

Overall parcels information, owner name, address, total assessed value, tax records, supplement/cancellation information and special assessment data

CATS-REAL-PARC.....Owner, buyer, address information  
 CATS-REAL-ASSR .....Assessed value for current assessment year  
 CATS-REAL-TREAS.....Assessed value for current tax year  
 CATS-REAL-REVAL.....Assessed value for future tax year  
 CATS-REAL-LEGAL .....Multiple legal lines  
 CATS-REAL-SITUS .....Multiple situs address lines  
 CATS-REAL-SAAPPL .....Special assessment applications  
 CATS-REAL-SADETL.....Special assessment value details  
 CATS-REAL-SAMKT .....Special assessment market records  
 CATS-REAL-TAX.....Tax billing information  
 CATS-REAL-RCT .....Receipting information  
 CATS-REAL-SUPP.....Supplemental tax billing information  
 CATS-REAL-SRCT .....Supplemental receipting information  
 CATS-REAL-CANC .....Tax cancellation information  
 CATS-REAL-PLAT .....Plat descriptions

## **SALE**

Sales transaction and research area

CATS-SALE-ACCT.....Sales information  
 CATS-SALE-DEED.....Deed information  
 CATS-SALE-AC-AV .....Summarized acres and assessed value data

CATS-SALE-ACRES.....	Copies of CATS-REAL-ACRES
CATS-SALE-BLDG.....	Copies of CATS-REAL-BLDG
CATS-SALE-CHAR.....	Copies of CATS-REAL-CHAR
CATS-SALE-CM-BLD.....	Copies of CATS-REAL-CM-BLD
CATS-SALE-CM-FF.....	Copies of CATS-REAL-CM-FF
CATS-SALE-CM-INC.....	Copies of CATS-REAL-CM-INC
CATS-SALE-CM-LMP.....	Copies of CATS-REAL-CM-LMP
CATS-SALE-CM-RNT.....	Copies of CATS-REAL-CM-RNT
CATS-SALE-CM-SEC.....	Copies of CATS-REAL-CM-SEC
CATS-SALE-CM-CPX.....	Copies of CATS-REAL-CM-CPX
CATS-SALE-CN-MKT.....	Copies of CATS-REAL-CN-MKT
CATS-SALE-COMMT.....	Sales comments by account
CATS-SALE-EASE.....	Copies of CATS-REAL-EASE
CATS-SALE-ETAL.....	Multiple ownership information
CATS-SALE-HSITE.....	Copies of CATS-REAL-HSITE
CATS-SALE-INFO.....	Sales information
CATS-SALE-JRNL.....	Transaction journaling
CATS-SALE-LAND.....	Copies of CATS-REAL-LAND
CATS-SALE-MF-CPX.....	Copies of CATS-REAL-MF-CPX
CATS-SALE-MHAV.....	Mobile home information
CATS-SALE-MHDETL.....	Mobile home detail information
CATS-SALE-MISC.....	Copies of CATS-REAL-MISC
CATS-SALE-OUTB.....	Copies of CATS-REAL-OUTB
CATS-SALE-RMAIL.....	Return mail information
CATS-SALE-SITUS.....	Copies of CATS-REAL-SITUS
CATS-SALE-SQFT.....	Copies of CATS-REAL-SQFT
CATS-SALE-SV-STN.....	Copies of CATS-REAL-SV-STN
CATS-SALE-SV-TNK.....	Copies of CATS-REAL-SV-TNK

## TABS

Personal property rates and miscellaneous description tables

TABS-SACLS.....	Special assessment class tables
CATS-TABS-SACLS.....	Special assessment class tables
TABS-SACAP.....	Special assessment cap tables
CATS-TABS-SACAP.....	Special assessment cap tables
CATS-TABS-CNTRY.....	Valid country names
CATS-TABS-CSUP.....	Valid cancellation/supplement types
CATS-TABS-DEED.....	Valid deed types
CATS-TABS-VER.....	Deed verification codes
CATS-APPR-NOTES.....	Valid appraiser note types
CATS-TABS-LUC.....	Valid land use codes
CATS-TABS-LOCO.....	Valid loan company information
CATS-TABS-MILL.....	Current millage breakdown by district
CATS-TABS-TMF.....	Valid treasurers' miscellaneous flags

**TXROLL**

Taxroll adjustment database

M-TXR-FUND .....Fund records  
TAXROLL-REC.....Adjustment detail records  
TAXROLL-JRNL.....Transaction journaling

<b>Current Record Counts</b>			
<b>Database/Dataset</b>	<b>Records</b>		
<b>AV</b>		A-FMS-GLNO	502006
CATS-AV-APPL	11796	CATS-GL-MAP	530557
CATS-AV-BASE-FRZ	71617	<b>CSUP</b>	
CATS-AV-COMMENT	30373	CATS-CSUP-DETL	123249
CATS-AV-FACTOR	33230	<b>CTAB</b>	
CATS-AV-INDICATE	229792	CATS-TABS-LRAR	20
CATS-AV-JRNL	212399	CATS-TABS-BSRT	668
CATS-AV-MARKET	71626	CATS-TABS-ROOF	95
CATS-AV-INCOME	1748	CATS-TABS-FLOOR	19
<b>BLDG</b>		CATS-TABS-HEAT	20
CATS-REAL-CHAR	167148	CATS-TABS-FIX	20
CATS-REAL-BLDG	128881	CATS-TABS-BI	19
CATS-REAL-OUTB	38102	CATS-TABS-FIRE	20
CATS-REAL-CM-BLD	11986	CATS-TABS-PBSMT	95
CATS-REAL-CM-INC	3495	CATS-TABS-GAR	95
CATS-REAL-CM-SEC	6787	CATS-TABS-PAT	19
CATS-REAL-CM-LMP	3008	CATS-TABS-POOL	19
CATS-REAL-CM-RNT	6140	CATS-TABS-COND	19
CATS-REAL-CN-CPX	99	CATS-TABS-DEPR	71
CATS-REAL-MF-CPX	3464	CATS-TABS-LOCM	19
CATS-REAL-MF-RNT	4866	M-GROUP	1
CATS-REAL-CN-MKT	3473	CATS-TABS-LCODE	8
CATS-REAL-SV-STN	226	CATS-TABS-ECODE	13
CATS-REAL-SV-TNK	279	CATS-TABS-ACODE	20
CATS-REAL-CM-FF	14	CATS-TABS-FLAGS	8
CATS-REAL-MHDETL	13836	CATS-TABS-TRANS	8
<b>BOE</b>		CATS-TABS-APPR	94
BOE-MASTER	20761	CATS-TABS-ABBR	1
<b>CERT</b>		CATS-TABS-BLD-AB	1
CATS-MAGENCY	119	CATS-TABS-BOOTH	42
CATS-MFUND	5416	CATS-TABS-FENCE	14
CATS-CERT-CD	2825	CATS-TABS-GRM	14
CATS-CERT-AGENCY	119	CATS-TABS-H-C	98
CATS-CERT-FUND	3826	CATS-TABS-HC-ABR	1
CATS-CERT-CDINFO	77318	CATS-TABS-HEIGHT	1
CATS-CERT-CR	430	CATS-TABS-KTCHN	14
CATS-CERT-CDD	181356	CATS-TABS-PERIM	112
<b>CODE</b>		CATS-TABS-SS-ABR	1
CATC-ABAR	4084	CATS-TABS-TANKS	112
CATS-CODE-ASSR	33436	CATS-TABS-TNK-AB	1
CATS-CODE-TREA	39742	M-BUILD-TYPE-ABB	101
CATS-CODE-FUND	90674	M-COMM-ABBRE	11
A-CATS-GLNO	28552	M-COMM-AIRCOMP-K	168
		M-COMM-BASEFL-KE	505
		M-COMM-DEPR-KEY	1271

M-COMM-ELEV-KEY	360	M-LAND-TYPE-ALPH	23
M-COMM-LOCAL-KEY	14	M-LAND-TYPE-NUM	23
M-COMM-MAINFL-KEY	1304	M-OUTBUILDING-TY	44
M-COMM-MEZZ-KEY	304	CATS-LAND-TYPE-D	23
M-COMM-SPKL-KEY	84	CATS-TABS-LD-ACR	2559187
M-COMM-SS-CW-KEY	610	CATS-TABS-LSQF-D	111006
M-CURR-YEAR-KEY	14	CATS-TABS-OUT-D	44
M-H-C-ABBR	13	CATS-TABS-OUTB-D	16
M-SS-CW-ABBR	52	CATS-TABS-REST-D	1268108
M-STORY-HITE-KEY	1487	CTAB-LAND-MISC-M	1180
M-TANK-ABBR	8	CTAB-LAND-MISC-D	1180
M-UNIT-IN-PLACE-	14	CTAB-LAND-VALADJ	34
CATS-TAB-HC-AB-D	13	CTAB-CAR-LVPLAT	5360
CATS-TAB-TNK-A-D	8	CTAB-CAR-LVAC-M	4647
CATS-TABS-ABBR-D	11	CTAB-CAR-LVAC-D	1540706
CATS-TABS-AIRC	168	CTAB-CAR-SQAC-M	13
CATS-TABS-BASE	505	CTAB-CAR-SQAC-D	19
CATS-TABS-BD-ABR	101	CTAB-CAR-RESIND	133
CATS-TABS-BTHS-D	170	CTAB-MH-BSRT	74727
CATS-TABS-C-DEPR	1271	CTAB-MH-FLOOR	162
CATS-TABS-C-LCL	14	CTAB-MH-ROOF	378
CATS-TABS-CURR	14	CTAB-MH-HEAT	378
CATS-TABS-CW-ABR	52	CTAB-MH-APPL	540
CATS-TABS-ELEV	360	CTAB-MH-FIRE	270
CATS-TABS-GRM-D	357	CTAB-MH-DEPR	66
CATS-TABS-H-C-D	1274	CTAB-MH-SKIRT	24
CATS-TABS-HITE-D	1487	CTAB-MH-AWNING	18
CATS-TABS-MAIN	1304	CTAB-MH-FOUND	42
CATS-TABS-MEZZ	304	CTAB-MH-FLOAT	72
CATS-TABS-PRIM-D	22972	CTAB-MH-PILING	12
CATS-TABS-SPKL	84	CTAB-MH-MISC	12
CATS-TABS-SS-CW	610	CTAB-MH-XWALL	432
CATS-TABS-TANK-D	1680	CTAB-MH-FIX	54
CATS-TABS-UNIT	14	CTAB-MH-RI	54
M-NEIGHBORHOOD	653	CATS-TABS-APR-PW	53
CATS-TABS-NH-GRP	654	CTAB-MH-COND	7
M-COMM-FLAG-KEY	23	CATS-TABS-T-BSRT	379
CATS-TABS-MAN-FL	23	CATS-ADJCND	10
CATS-LAND-ACRE	2559188	CATS-CGRM-M	5
CATS-LAND-TYPE	23	CATS-CGRM-D	300
CATS-TABS-COMM-M	55164	CATS-TABS-PL-MIN	148
CATS-TABS-LSQF-M	111006	<b>HIST</b>	
CATS-TABS-OUT-M	1	CATH-ACCT	166526
CATS-TABS-OUTB-M	4	CATS-HIST-DETL	4752271
CATS-TABS-REST-M	1278167	CATS-REAL-JRNL	316197
		<b>ITAX</b>	

TAX-DATA	151431	CATS-REAL-RCT	1074789
<b>LAND</b>		CATS-REAL-SUPP	11780
CATS-REAL-LAND	167148	CATS-REAL-SRCT	13739
CATS-REAL-HSITE	128296	CATS-REAL-CANC	11310
CATS-REAL-ACRES	54994	<b>SALE</b>	
CATS-REAL-EASE	17355	CATS-SALE-ACCT	2326
CATS-REAL-SQFT	11237	CATS-SALE-DEED	40
CATS-REAL-MISC	93879	CATS-SALE-AC-AV	240370
<b>LREF</b>		CATS-SALE-ACRES	67184
LREF-TRAN	86890	CATS-SALE-BLDG	165030
<b>PERS</b>		CATS-SALE-CHAR	240390
CATS-PERS-ACCT	17216	CATS-SALE-CM-BLD	13362
CATS-PERS-FARMAV	663	CATS-SALE-CM-FF	7
CATS-PERS-COMMAV	12987	CATS-SALE-CM-INC	3357
CATS-PERS-CFDETL	11512	CATS-SALE-CM-LMP	2192
CATS-PERS-TAX	30793	CATS-SALE-CM-RNT	5560
CATS-PERS-RCT	37230	CATS-SALE-CM-SEC	5235
CATS-PERS-SUPP	947	CATS-SALE-CN-CPX	84537
CATS-PERS-SRCT	936	CATS-SALE-CN-MKT	5508
CATS-PERS-CANC	1012	CATS-SALE-COMMT	36439
CATS-ACCT-AUTO	216	CATS-SALE-EASE	21590
CATS-DATE-AUTO	11	CATS-SALE-ETAL	51124
CATS-PERS-JRNL	2804	CATS-SALE-FLGD	54
<b>RC</b>		CATS-SALE-HSITE	185211
OPERATORS	58	CATS-SALE-INFO	242603
OPER-DATE	36	CATS-SALE-JRNL	94
RCT-DETL	4215	CATS-SALE-LAND	240391
REVERSAL	10	CATS-SALE-MF-CPX	4758
SPEC-DEP	0	CATS-SALE-MF-RNT	6862
DEROG-MASTER	162925	CATS-SALE-MHACC	5711
<b>RCL</b>		CATS-SALE-MHAV	3222
OPERATORS	22	CATS-SALE-MHDETL	3199
BATCH	241	CATS-SALE-MISC	91767
RCL-TRAN	34916	CATS-SALE-OUTB	43576
<b>REAL</b>		CATS-SALE-RMAIL	0
CATS-REAL-PARC	167148	CATS-SALE-SITUS	14889
CATS-REAL-ASSR	167148	CATS-SALE-SQFT	13241
CATS-REAL-TREAS	167148	CATS-SALE-SV-STN	278
CATS-REAL-REVAL	35926	CATS-SALE-SV-TNK	272
CATS-REAL-BOE	1	<b>TABS</b>	
CATS-REAL-LEGAL	474267	TABS-SACLS	1034
CATS-REAL-SITUS	11911	CATS-TABS-SACLS	1034
CATS-REAL-SAAPPL	108706	TABS-SACAP	3433
CATS-REAL-SADETL	209116	CATS-TABS-SACAP	3433
CATS-REAL-SAMKT	293721	CATS-TABS-CNTRY	38
CATS-REAL-TAX	666860	CATS-TABS-CSUP	61

CATS-TABS-DEED	20	CATS-TABS-TMF	14
CATS-TABS-VER	33	<b>TXROLL</b>	
CATS-APPR-NOTES	0	M-TXR-FUND	323
CATS-TABS-LUC	373	TAXROLL-REC	18473
CATS-TABS-LOCO	461	TAXROLL-JRNL	678
CATS-TABS-MILL	306		

**Data Layout Samples****CATS-REAL-PARC**

RP-OM-ID	J2
RPA-SER-NBR	X10
RPA-INACT-FLAG	X2
RPA-RECORD-BK	X2
RPA-RECORD-PG	X4
RPA-CENSUS-NBR	X6
RPA-GEO-CODE	X12
RPA-L-SEG-DATE	X6
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RPP-RVW-APPR-NBR	X2	RPQ-PR-MF-CVR-CN	X2
RPP-SC-PROP-TYPE	X4	RPQ-PR-UF-CVR-TP	X2
RPP-APPR-AREA	X2	RPQ-PR-UF-CVR-CN	X2
RPP-ROUNDED	P4	RPQ-SC-MF-CVR-TP	X2
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TERM-ID	X4	RPQ-FULL-BATH	X2
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UPD-TIME	X6	RPQ-HALF-BATH	X2
		RPQ-QTR-BATH	X2
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RPS-TERRAIN	X2	RPT-HOME-BAS-VAL	P8
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RPS-CUL-DE-SAC	X2	RPT-HOME-ADJ-TP	X2
RPS-RIV-VW-TYPE	X2	RPT-HOME-SITES	X2
RPS-RIV-VW-QUAL	X2	RPT-HOME-IMP-FL	X2
RPS-LK-VW-QUAL	X2	USER-ID	X8
RPS-CR-MMLK-QUAL	X2	TERM-ID	X4

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RPV-EASE-BAS-VAL	P8	HSB-HISTORY	X110
RPV-EASE-CODE	X2	USER-ID	X8
RPV-REST-CODE	X2	TERM-ID	X4
RPV-ROAD-AC	P4	UPD-DATE	X8
USER-ID	X8	UPD-TIME	X6
TERM-ID	X4	<b>Data Type Specifications</b>	
UPD-DATE	X6	X(###)	Unrestricted ASCII character string
UPD-TIME	X6	J(2)	Signed binary integer in 2's complement form
<b>CATS-REAL-SQFT</b>		P(4,8,12)	Packed decimal number
RP-OM-ID	J2		
RPW-INCOME-SER	X10		
RPW-INDEX	P4		
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**APPENDIX E – DATA CONVERSION  
EXPECTATIONS**

**CLARK COUNTY ATS RFP PROJECT**

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### Data Conversion Expectations

Currently, the CATS system utilizes data structures proprietary to the HP minicomputer system with addition third party indexing products to enhance the retrieval process. The bulk of the data is stored in TurboIMAGE structures. The system also communicates with various internal and external systems. The data and interfaces that will need to be converted are outlined in this document. For a map of the interfaces and data please refer to the Software Applications & Data Interfaces map. This map is cross referenced to the Overview Document.

### Database Structures

#### AV

Information need to maintain assessed value information for elderly taxpayers

CATS-AV-APPL .....	Application record
CATS-AV-BASE-FRZ.....	Summarized value records
CATS-AV-COMMENT .....	Comment records
CATS-AV-FACTOR .....	Adjustment factor records
CATS-AV-INDICATED .....	Indicated value record
CATS-AV-JRNL .....	Transaction journal record
CATS-AV-MARKET .....	Market value records by year
CATS-AV-INCOME .....	Income amount record

#### BLDG

Building attributes related to a parcel includes summarized and specific detail records for residential buildings, outbuildings, multi-family complex, condominium, service stations/carwash, commercial income and market

CATS-REAL-CHAR .....	Summarized structure information
CATS-REAL-BLDG .....	Residential building characteristics data
CATS-REAL-OUTB .....	Out building data
CATS-REAL-CM-BLD.....	Commercial building data
CATS-REAL-CM-INC.....	Commercial income data
CATS-REAL-CM-SEC .....	Commercial building section data
CATS-REAL-CM-LMP .....	Commercial lump sum data
CATS-REAL-CM-RNT.....	Commercial rent data
CATS-REAL-CN-CPX.....	Commercial complex data
CATS-REAL-MF-CPX .....	Commercial multi-family complex data
CATS-REAL-MF-RNT .....	Commercial multi-family rent data
CATS-REAL-CN-MKT .....	Commercial condominium data
CATS-REAL-SV-STN .....	Service station/carwash data
CATS-REAL-SV-TNK.....	Service station tank data
CATS-REAL-CM-FF .....	Commercial floor footage data
CATS-REAL-MHDETL.....	Mobile home structure data

**BOE**

Data storage area for Board of Equalization information

BOE-MASTER .....Appeals information

**CERT**

Process area used to hold summarized assessed value information during the certification process

CATS-MAGENCY .....Master agency records  
 CATS-MFUND.....Fund number records  
 CATS-CERT-CD.....Code district records  
 CATS-CERT-AGENCY.....Detailed agency records  
 CATS-CERT-FUND.....Detailed fund records  
 CATS-CERT-CDINFO.....Code district information records  
 CATS-CERT-CR .....Code district millage information  
 CATS-CERT-CDD .....Code district value information

**CODE**

Code district summary information including millage rates

CATC-ABAR .....General fund numbers  
 CATS-CODE-ASSR.....Summarized value information by district  
 CATS-CODE-TREA .....Summarized tax information by district  
 CATS-CODE-FUND.....Fund information  
 A-CATS-GLNO.....Mapping information into FMS  
 A-FMS-GLNO.....Mapping information into FMS  
 CATS-GL-MAP.....Mapping information into FMS

**CSUP**

Cancellation/supplement information used to balance taxroll to actual receipting transactions

CATS-CSUP-DETL .....Cancellation/supplement changes

**CTAB**

Tables for market calculation, annual adjustment and computerized appraisal recheck and more

CATS-TABS-LRAR .....Residential Large Area Rate

CATS-TABS-BSRT .....	Residential Base Rate Table
CATS-TABS-ROOF.....	Roof Rates
CATS-TABS-FLOOR .....	Floor Rates
CATS-TABS-HEAT.....	Heat Rates
CATS-TABS-FIX.....	Fixture Rates
CATS-TABS-BI .....	Build-in Rates
CATS-TABS-FIRE.....	Fireplace Rates
CATS-TABS-PBSMT .....	Porch/Basement Rates
CATS-TABS-GAR.....	Garage Rates
CATS-TABS-PAT .....	Patio Rates
CATS-TABS-POOL.....	Pool Rates
CATS-TABS-COND .....	Condition Rates
CATS-TABS-DEPR .....	Depreciation Rates
CATS-TABS-LOCM.....	Local Cost Modifier
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CATS-TABS-ECODE .....	Easement Code Table
CATS-TABS-ACODE.....	Adjustment Code Table
CATS-TABS-FLAGS.....	Flag Code Table
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CATS-TABS-GRM .....	Gross Rent Multiplier
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CATS-TABS-HEIGHT.....	Comm. Story Height Multiplier
CATS-TABS-KTCHN.....	Comm. Kitchen Rates
CATS-TABS-PERIM .....	Comm. Floor Area Rates
CATS-TABS-SS-ABR .....	Service Station/Carwash Abbreviation Table
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M-COMM-DEPR-KEY .....	Comm. Depreciation Table
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M-COMM-LOCAL-KEY.....	Comm. Local Cost Multiplier Table
M-COMM-MAINFL-KE.....	Comm. Main Floor Cost Table
M-COMM-MEZZ-KEY .....	Comm. Mezzanine Cost Table
M-COMM-SPKL-KEY .....	Comm. Sprinklers Table
M-COMM-SS-CW-KEY .....	Service Station/Carwash Table
M-CURR-YEAR-KEY .....	Comm. Current Cost Table
M-H-C-ABBR.....	Comm. Heating/Cooling Abbreviations
M-SS-CW-ABBR .....	Service Station/Carwash Abbreviations

M-STORY-HITE-KEY.....	Comm. Story/Height Multiplier
M-TANK-ABBR .....	Comm. Tank/Bulk Oil Abbreviations
M-UNIT-IN-PLACE- .....	Comm. Unit in place Multiplier
CATS-TAB-HC-AB-D.....	Comm. Heating/Cooling Abbreviation
CATS-TAB-TNK-A-D.....	Comm. Tank Abbreviation
CATS-TABS-ABBR-D .....	Comm. Abbreviations
CATS-TABS-AIRC.....	Comm. Air Compressor Table
CATS-TABS-BASE .....	Comm. Base Table
CATS-TABS-BD-ABR .....	Comm. Booth Abbreviation
CATS-TABS-BTHS-D.....	Comm. Booths Table
CATS-TABS-C-DEPR .....	Comm. Depreciation Table
CATS-TABS-C-LCL.....	Comm. Local Cost Multiplier
CATS-TABS-CURR.....	Comm. Current Cost Table
CATS-TABS-CW-ABR .....	Comm. Carwash Abbreviation
CATS-TABS-ELEV .....	Comm. Elevator Table
CATS-TABS-GRM-D .....	Comm. Gross Rent Multiplier
CATS-TABS-H-C-D .....	Comm. Heating/Cooling Table
CATS-TABS-HITE-D .....	Comm. Height Table
CATS-TABS-MAIN.....	Comm. Main Floor Table
CATS-TABS-MEZZ.....	Comm. Mezzanine Table
CATS-TABS-PRIM-D .....	Comm. Perimeter Table
CATS-TABS-SPKL.....	Comm. Sprinkler Table
CATS-TABS-SS-CW .....	Service Station/Carwash Table
CATS-TABS-TANK-D .....	Comm. Tank Table
CATS-TABS-UNIT.....	Comm. Units Table
M-NEIGHBORHOOD .....	Neighborhood Table
CATS-TABS-NH-GRP.....	Neighborhood Group Table
M-COMM-FLAG-KEY.....	Comm. Flag Key
CATS-TABS-MAN-FL .....	Manual Flag Table
CATS-LAND-ACRE.....	Land/Homesite/Easement Table
CATS-LAND-TYPE.....	Land Record Type Table
CATS-TABS-COMM-M.....	Interim Commercial Table
CATS-TABS-LSQF-M.....	Residential Lot Sqft Table
CATS-TABS-OUT-M .....	Residential Outbuilding Table
CATS-TABS-OUTB-M.....	Residential Outbuilding Table
M-LAND-TYPE-ALPH .....	Residential Land Type Table
M-LAND-TYPE-NUM.....	Residential Land Number Table
M-OUTBUILDING-TY .....	Residential Outbuilding Type Table
CATS-LAND-TYPE-D .....	Residential Land Type Table
CATS-TABS-LD-ACR.....	Residential Acre Adjustment Table
CATS-TABS-LSQF-D .....	Residential Sqft Adjustment Table
CATS-TABS-OUT-D .....	Residential Outbuilding Type Table
CATS-TABS-OUTB-D .....	Residential Outbuilding Rate Table
CTAB-LAND-MISC-M .....	Residential Land Miscellaneous Table
CTAB-LAND-MISC-D .....	Residential Land Miscellaneous Table
CTAB-CAR-LVPLAT.....	Residential Plat Table

CTAB-CAR-LVAC-M .....	Residential Acreage Table
CTAB-CAR-LVAC-D .....	Residential Acreage Table
CTAB-CAR-SQAC-M .....	Residential Sqft Table
CTAB-CAR-SQAC-D .....	Residential Sqft Table
CTAB-MH-BSRT .....	Mobile Home Base Rate Table
CTAB-MH-FLOOR .....	Mobile Home Floor Table
CTAB-MH-ROOF .....	Mobile Home Roof Table
CTAB-MH-HEAT .....	Mobile Home Heat Table
CTAB-MH-APPL .....	Mobile Home Appliance Table
CTAB-MH-FIRE .....	Mobile Home Fire Table
CTAB-MH-DEPR .....	Mobile Home Depreciation Table
CTAB-MH-SKIRT .....	Mobile Home Skirting Table
CTAB-MH-AWNING .....	Mobile Home Awning Table
CTAB-MH-FOUND .....	Mobile Home Foundation Table
CTAB-MH-FLOAT .....	Mobile Home Float Table
CTAB-MH-PILING .....	Mobile Home Piling Table
CTAB-MH-MISC .....	Mobile Home Miscellaneous Table
CTAB-MH-XWALL .....	Mobile Home Exterior Wall Table
CTAB-MH-FIX .....	Mobile Home Fixture Table
CTAB-MH-RI .....	Mobile Home Rough-in Table
CATS-TABS-APR-PW .....	Appraiser Passwords
CTAB-MH-COND .....	Mobile Home Condition Table
CATS-TABS-T-BSRT .....	Residential Base Rate Table
CATS-ADJCND .....	Residual Building Value Adjustment
CATS-CGRM-M .....	Comm. Gross Rent Multiplier Table
CATS-CGRM-D .....	Comm. Gross Rent Multiplier Table
CATS-TABS-PL-MIN .....	Half Class Adjustment Table

## HIST

Transaction journaling and change history

CATS-HIST-DETL .....	Historical changes
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## LAND

Land attributes related to a parcel, includes summary and specific detail records for homesite, land acres, easements, sqft and miscellaneous data

CATS-REAL-LAND .....	Summarized land information
CATS-REAL-HSITE .....	Homesite data
CATS-REAL-ACRES .....	Acreage data
CATS-REAL-EASE .....	Easement data
CATS-REAL-SQFT .....	Square foot data
CATS-REAL-MISC .....	Miscellaneous data

**LIDDB**

Local improvement district account information

LID-MASTER .....	Master record of lid types
ACCT-MASTER .....	Master account records
BILL-MASTER .....	Bill and receipt code information by lid type
BATCH-INFO .....	Batch header information
ENTRY .....	Data entry area for online program
TRAN-RECORD .....	Transaction records related to a batch
LOAN-COMPANY .....	Loan company information specific to lids

**LREF**

Data structure used to provide batch input for loan reference information

BATCH-INFO .....	Batch header information
LREF-TRAN.....	Account and loan reference information

**PERS**

Personal property account information

CATS-PERS-ACCT .....	Owner, buyer, address information
CATS-PERS-FARMAV .....	Assessed farm value for the current year
CATS-PERS-COMMAV .....	Assessed commercial value for current year
CATS-PERS-CFDETL.....	Detailed item value information
CATS-PERS-TAX.....	Tax billing information
CATS-PERS-RCT .....	Tax receipting information
CATS-PERS-SUPP .....	Supplemental tax information
CATS-PERS-SRCT .....	Supplemental receipt information
CATS-PERS-CANC.....	Cancellation information
CATS-PERS-JRNL .....	Transaction journaling

**REAL**

Overall parcels information, owner name, address, total assessed value, tax records, supplement/cancellation information and special assessment data

CATS-REAL-PARC.....	Owner, buyer, address information
CATS-REAL-ASSR .....	Assessed value for current assessment year
CATS-REAL-TREAS.....	Assessed value for current tax year
CATS-REAL-REVAL.....	Assessed value for future tax year
CATS-REAL-LEGAL .....	Multiple legal lines
CATS-REAL-SITUS .....	Multiple situs address lines

CATS-REAL-SAAPPL .....	Special assessment applications
CATS-REAL-SADETL .....	Special assessment value details
CATS-REAL-SAMKT .....	Special assessment market records
CATS-REAL-TAX .....	Tax billing information
CATS-REAL-RCT .....	Receipting information
CATS-REAL-SUPP .....	Supplemental tax billing information
CATS-REAL-SRCT .....	Supplemental receipting information
CATS-REAL-CANC .....	Tax cancellation information
CATS-REAL-PLAT .....	Plat descriptions

## SALE

### Sales transaction and research area

CATS-SALE-ACCT .....	Sales information
CATS-SALE-DEED .....	Deed information
CATS-SALE-AC-AV .....	Summarized acres and assessed value data
CATS-SALE-ACRES .....	Copies of CATS-REAL-ACRES
CATS-SALE-BLDG .....	Copies of CATS-REAL-BLDG
CATS-SALE-CHAR .....	Copies of CATS-REAL-CHAR
CATS-SALE-CM-BLD .....	Copies of CATS-REAL-CM-BLD
CATS-SALE-CM-FF .....	Copies of CATS-REAL-CM-FF
CATS-SALE-CM-INC .....	Copies of CATS-REAL-CM-INC
CATS-SALE-CM-LMP .....	Copies of CATS-REAL-CM-LMP
CATS-SALE-CM-RNT .....	Copies of CATS-REAL-CM-RNT
CATS-SALE-CM-SEC .....	Copies of CATS-REAL-CM-SEC
CATS-SALE-CM-CPX .....	Copies of CATS-REAL-CM-CPX
CATS-SALE-CN-MKT .....	Copies of CATS-REAL-CN-MKT
CATS-SALE-COMMT .....	Sales comments by account
CATS-SALE-EASE .....	Copies of CATS-REAL-EASE
CATS-SALE-ETAL .....	Multiple ownership information
CATS-SALE-HSITE .....	Copies of CATS-REAL-HSITE
CATS-SALE-INFO .....	Sales information
CATS-SALE-JRNL .....	Transaction journaling
CATS-SALE-LAND .....	Copies of CATS-REAL-LAND
CATS-SALE-MF-CPX .....	Copies of CATS-REAL-MF-CPX
CATS-SALE-MHAV .....	Mobile home information
CATS-SALE-MHDETL .....	Mobile home detail information
CATS-SALE-MISC .....	Copies of CATS-REAL-MISC
CATS-SALE-OUTB .....	Copies of CATS-REAL-OUTB
CATS-SALE-RMAIL .....	Return mail information
CATS-SALE-SITUS .....	Copies of CATS-REAL-SITUS
CATS-SALE-SQFT .....	Copies of CATS-REAL-SQFT
CATS-SALE-SV-STN .....	Copies of CATS-REAL-SV-STN
CATS-SALE-SV-TNK .....	Copies of CATS-REAL-SV-TNK

**TABS**

Personal property rates and miscellaneous description tables

CATS-TABS-CNTRY .....	Valid country names
CATS-TABS-CSUP .....	Valid cancellation/supplement types
CATS-TABS-DEED.....	Valid deed types
CATS-TABS-VER .....	Deed verification codes
CATS-APPR-NOTES.....	Valid appraiser note types
CATS-TABS-LUC .....	Valid land use codes
CATS-TABS-LOCO.....	Valid loan company information
CATS-TABS-MILL.....	Current millage breakdown by district
CATS-TABS-TMF .....	Valid treasurers' miscellaneous flags

**TXROLL**

Taxroll adjustment database

M-TXR-FUND .....	Fund records
TAXROLL-REC.....	Adjustment detail records
TAXROLL-JRNL.....	Transaction journaling

**Other Personal Property Tables**

<b>TABLE:</b>	<b>USE:</b>
tblAllPossibleAcctNumbers	List of all possible Personal Property account numbers
tblAsset Detail	List of account assets
tblComments	Tracking table – all procedures, comments, zip+4
tblComments-Treas	Treas. Tracking table – all procedures, comments, zip+4
tblComments-Treas_Inactive	Inactive accounts “tblComments-Treas” info
tblComments_Inactive	Inactive accounts “tblComments” info
tblDBYear	Assessment and Tax year
tblDownload	Info from CATS downloaded into Access
tblDownload_situs	A temporary place to dump the situs number to drop leading zeros before including it into the situs address string
tblIND	List of Industrial accounts
tblLevyRates_CodeDist	List of all current code districts
tblListingCOMMAcctNo	List of Commercial account numbers created at time of printing Listings
tblListingCOMMCount	List of account numbers and count of asset lines to determine how many asset detail pages will print (for Listing)
tblListingCOMMLetter	List of first letter in owner name, used when batch printing Listings
tblListingFARMSAcctNo	List of Farms account numbers created at time of printing

	Listings
tblListingLEASEDAcctNo	List of Leased account numbers created at time of printing Listings
tblMasterSub	List of Master account numbers and all the sub accounts that match with master – both Leased and Farms
tblPar	Paragraph in Farms Listing
tblPNF-CATSInput	List of Total AV and Supplies amount for data entry into CATS before printing PNF reports
tblPNF_AV<500	List of Total AV for accounts with Total AV <\$500 that qualify for PNF except for being <\$500
tblPNF_CATSValue	Used in cleaning up wording on CATS – holds data from CATS
tblRateList	Lookup Table to calculate depreciated value
tblTaxDetail	Holds tax detail from CATS treas tables – both billed and paid
tblTaxDetail_BILLED	Tax detail from CATS treas tables – billed amounts
tblTaxDetail_PAID	Tax detail from CATS treas tables – paid amounts
tblUndeliverables	List of accounts returned in mail as undeliverable

## **Interfaces**

The interfaces listed below are currently in place to communicate with other systems and vendors. Clark County will expect these interfaces to be written in a maintainable format. The number of the item can be directly mapped into the Software Applications Overview document.

### **SD - Administrative Refund Processing (item 1)**

This process creates a flat file to Oracle AP specification for importing.

### **Advanced Taxes (item 2)**

Nothing required for this item.

### **SD - Automated Voice Response System (AVRS item 5)**

The AVRS system retrieves information via parcel account number from the CATS/LID databases. Account numbers (parcel numbers) must be keyed into the AVRS system to retrieve information from the CATS/LID system. The system also allows for requesting property tax statements. A file is created which on a nightly basis sends a request to print statements. The statements are provided to the Treasurers' Office each morning and subsequently are mailed out.

### **SD - Cashier Refunds (item 7)**

Links to Admin Refund DB for batch processing and loading into Oracle AP for payment.

### **Board of Equalization (BOE item 11)**

The Board of Equalization system is written in COBOL, Speedware and Quiz, and interfaces with the existing CATS system. It is an automated petition tracking system that allows board staff to track:

- Petition data
- Response data (from property owner and Assessor's staff)
- Hearing dates
- Board corrections to the certified roll
- Board order data

The system generates multiple tracking reports by petition number, property number, owner name, neighborhood and property type to enhance scheduling, hearing documentations, case disposition, unilateral equalization and faster distribution of board decisions. The system also produces annual year-end session statistical reports by assessment calendar year and property type, along with case dispositions for auditing purposes.

Statistical Data:

**Annual Call Volume:** 1,000 to 2,000 annually

**Timing:** Anytime

**Manual / Automatic processing:** Combination of manual data entry and interface with Assessor's (CATS) database.

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Letters, inner office communications, status reports, hearing transcripts, hearing schedules

**Responsibility party:** Board of Equalization, Department of Assessment and GIS, IS

### **REQUIREMENTS:**

The new system should provide a Board of Equalization program that interfaces with the Assessor's programs (real and personal property). If the new system does not provide such a program, the existing Board of Equalization program will need to be converted to interface with the new system.

### **SD - Distribution (item 18)**

Interfaces with Oracle FMS

### **SD - Electronic Taxation (item 19)**

A flat file of CATS taxation data is extracted and refreshed to the FTP site weekly. This file is extracted every weekend and represents the current tax status of the real property accounts as of the previous Friday. A file is also created for assessments and fees.

### **SD - Exception Item Processing (EIP item 20)**

All receipts, pending or complete from all receipting modules are pulled into a file which is then transferred to the remittance processor nightly. This allows the **remittance processor** to not process the transactions that have payments pending or associated with the account. The file is also available to all cashiers so that we limit the number of duplicate payments we receive thus limiting the number of refunds we have to complete.

### **Fire Patrol Assessments (item 21, 47, 48)**

GIS receives a file from the Department of Natural Resources and loads it into CATS and into the tax statement program. ASCII compliant file upload into CATS via an formatted Excel Spreadsheet.

Statistical Data,

**Volume:** 24,000 records created annually

**Timing:** Between December and January

**Manual / Automatic processing:** Automated

**Files processed:** Incoming file from GIS is used to identify and create tax records

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Detail and summary report of records created  
**Responsibility party:** IS, GIS, Treasurers

**Requirements** This interface will still be needed in the new system.

### **SD - Real Estate & Personal Property Tax Bill Creation (item 26)**

Electronic files are created for Mortgage Companies.

### **Tidemark Interface (item 27 and item 76)**

Imports and exports occur daily between the CATS system and the Tidemark Building Permits system. This interface carries vital permit information into the CATS system and sends parcel addressing information back to permits. Data transfer methods include overall, incremental and on-request transfers from CATS to permits and daily transfers from permits into CATS for permits selected by date range. Ad hoc updates occur directly from GIS for environmental constraints, code districts and traffic impact fees.

Statistical Data:

**Annual Volume:** 10,000

**Timing:** Daily and on-request

**Manual/Automatic processing:** Automated

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Various error reports indicating permits that do not correlate with CATS

**Responsible party:** County IS for CATS and Tidemark

### **Requirements:**

An interface methodology that will allow communication between GIS, CATS and Tidemark.

### **SD - Tax Receipting from the Remittance Processor (item 32)**

All payments come directly from the remittance network and loaded directly into RCL with a flag noting they are remittance batches of payments to accommodate the necessary accounting entries.

### **SD - Tax Receipting from Mortgage Companies (item 32)**

Mortgage receipting files are received directly from the mortgage companies via FTP and loaded into RCL with a flag that they are mortgage companies to accommodate the necessary accounting entries.

### **Certification Access Database (item 35)**

No conversion required.

**Clean Water Program (CWP item 37)**

A flat file is sent from the GIS system to the CATS system containing CWP account information.

Statistical Data,

**Volume:** 61,258 records created annually

**Timing:** Early May

**Manual / Automatic processing:**

**Files processed:** Incoming file from GIS is used to identify and create tax records

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Both detailed and summary reports are created for balancing purposes

**Responsibility party:** IS, GIS, Treasurer

**Requirements** This interface will still be needed in the new system.

**SD/?? - Columbia Ultimate Business Systems (CUBS item 40)**

Requirements Unknown

We (Hal & Myself) will need to work with Beckie and/or the vendor. Beckie is very fluent in CUBS from a workflow standpoint.

**DC Sketch (item 45)**

Clark County currently uses DCSketch for building sketches. These sketches are stored in the proprietary DCSketch program and as a TIF image for display on the Internet.

The new Assessment and Taxation system will need to convert the existing DCSketch vector drawings into a format compatible with the new system's sketch tool.

The new sketch program will need to be able to create TIF images of the building sketch for display on the Internet.

**Volume:** 50,000 existing sketches.

**Manual / Automatic processing:** TIF file will need to be generated every time sketch is updated. Converted sketch files should also create new TIF images for use on the Internet.

**Will this requirement change with a new system:** It is anticipated that the County will migrate from DCSketch the sketch package recommended by the vendor.

**Reports (to be) generated:** TIF file for each property

**Responsibility party:** Vendor will be responsible for converting DCSketch proprietary files into new sketch program. GIS will be responsible for displaying new TIF files on the Internet.

**SD - Debt Service (item 46)**

Exports files for Oracle FMS ADI

SteveD> I need Cathy's input. She is out today.

Statistical Data,

**Volume:**

**Timing:**

**Manual / Automatic processing:**

**Files processed:**

**Will this requirement change with a new system:**

**Reports (to be) generated:**

**Responsibility party:**

**Requirements****SD - Financial Management System (FMS item 52)**

Various inputs from the CATS system are transferred into the FMS system on a daily basis.

**GIS Applications (item 53)**

Platform: Microsoft SqlServer 2000, ESRI Spatial Data Engine (SDE) 9.1

Description: Clark County has a mature enterprise GIS system. This system serves the needs of the entire County including cities, schools, emergency services, utilities, etc. The existing CAMA database is well integrated into the GIS and is used throughout the County for growth management and planning, facilities management, emergency response and preparedness. GIS provides a mechanism for linking a wide range of local government information systems.

Interface Type: This is a two-way interface. The interface must support batch uploads and downloads, real time inquiry, real time updates.

Date Frequency: Frequency of uploads will include; real-time, nightly, weekly, annually, ad-hoc.

**Web Applications**

Platform: Microsoft IIS, Cold Fusion, .NET framework

Description: Clark County's Property Information Center (PIC) provides a single point of inquiry for all property based information systems. The PIC displays this information in format compliant with the County's Internet format standards. The PIC includes data

from CAMA, Taxes, Building Permits, Records Office, County Survey Vault, etc. The PIC is integrated with the County's Internet Mapping Application. New IS applications should provide a secure, standardized interface to provide data to the PIC in real time.

<http://gis.clark.wa.gov/applications/gishome/property/index.cfm?fuseaction=showproperty>

Interface Type: Web Services, XML.

Data Frequency: Real Time

### **SD - Internet Taxes (item 56)**

Tax data for interfacing the counties website

### **LID / Assessments and Fees System (item 59)**

Lighting – A file is received from Clark Public Utility that is loaded into LID, LID creates a file to be sent to the vendor for generation of statements.

Statistical Data,

**Volume:** 28,000 records created annually

**Timing:** Mid December

**Manual / Automatic processing:** Automatic

**Files processed:** LUDTAX and RLDTAX

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Detailed and summary reports are created for balance purposes.

**Responsibility party:** IS, Treasurer

**Requirements** This interface will still be needed in the new system.

### **SD - Loan Refund Processing (item 61)**

Administrative refund batches are loaded into Oracle AP for payment.

### **Parcel Review Inquiry System (PARIS item 66)**

The Parcel Assessment Review Information System (PARIS) is a FoxPro database whose purpose is to track taxpayer calls and inquiries (ranging from simple questions to appeals at the Board of Equalization) from the point of entry through resolution of the issue.

PARIS is primarily used by the assessor's staff, both appraisers and support staff.

PARIS allows the user to input caller information: name, address, phone numbers, reason codes, and problem codes. The comment module allows unlimited data entry of comments with each new comment identified by date and time entered and who did the data entry. General parcel information is extracted from the CATS database and

displayed in an easy to read format, such as situs address, parcel size, assessor neighborhood number, certified assessed value of land and buildings, and newest values as printed on the Notification of Value Change letter.

The activity module allows the appraiser to select various letters to mail to the property owner in pursuit of issue resolution such as Cancellation/Supplemental letters, “B” and “C” letters (value change and no value change, respectively). Also available are selections which prompt inner office communications: address change request, processing instructions etc.

The PARIS database also interfaces with the BOE database in CATS to display, petition numbers, intake dates, hearing dates, and hearing resolutions. PARIS stores multiple years of information.

In our current environment, the PARIS system is available as long as the network is functioning.

Statistical Data:

**Annual Call Volume:** Roughly 2,000 to 3,000 calls per year tracked.

**Timing:** Anytime

**Manual / Automatic processing:** Combination of manual data entry and live interface with CATS data.

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Letters, inner office communications (CRYSTAL Reports)

**Responsibility party:** Outside Vendor

### **REQUIREMENTS:**

The new system should provide a Call and Appeal Tracking Module that interfaces with the Assessor’s programs (real and personal property). This program should be able to track general inquiry calls, as well as Value Appeals at both the local BOE and state BTA with similar functionality as found in PARIS. If the new system does not provide such a program, the existing PARIS program will need to be modified to interface with the new CAMA system.

### **SD - Petition and Extraction Refunds (item 68)**

Links to administration refund database for batch processing and loading into Oracle AP for payment.

### **SD - Sympro (item 74)**

Access links to Sympro for purposes of data input, reporting, and accounting which creates a flat file for importing to the Oracle GL.

[SteveD> I need Cathy's input, but I don't believe there is any interface here.](#)

**Personal Property Discovery**

The processing of Clark County's personal property commercial and farm accounts is done on an Access database. The database does not interface with the CATS system. The Assessor uses CATS only to maintain/store the information needed to create and maintain the personal property assessment and tax rolls. The personal property Access database is used to perform all other personal property assessment functions.

Statistical Data:

**Annual Volume:** Approximately 7,200 commercial and 455 farm accounts

**Timing:** Anytime

**Manual / Automatic processing:** Combination of manual data entry and automatic processing

**Will this requirement change with a new system:** No

**Reports (to be) generated:** Letters, statistical reports, management reports, forms, value notifications

**Responsibility party:** Assessor

**REQUIREMENTS:**

The new system will replace this database and the information stored in the database will need to be converted to the new system.

**eProperty Card**

The eProperty card project contains references to 3 different digital document databases that need to be addressed by the new system.

1. It contains 141,000 digital photos of buildings and property. These will need to be converted to the new systems building photo management scheme. All of the systems seem to have this feature, and I believe there is a set of questions in the RFP around digital photos. It is a conversion issue.
2. It contains 112,000 scanned and retired building cards. These documents belong in a document management system. Will the new system have a document management system? Or will it link to the Accorde system? These images are static and managed outside of CATS so in my mind they are a low priority. These documents are stored in jpg format because they are color.
3. The eProperty card program also manages and displays the tiff images of the building sketches that are created with the DCSketch program.  
(see the DCSketch report)

Requirements: These documents be managed by the new system. These documents be readily available for use by the County for inclusion in dynamic web pages (Property Information Center, and Assessor eBuilding Card Page)