Tarrant Appraisal District

REQUEST FOR PROPOSALS

FOR A

MASS APPRAISAL SYSTEM

05/10/2024

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I. GENERAL INFORMATION

GOALS

To acquire and implement a fully integrated appraisal system that includes hardware, software and hardware system, with ongoing maintenance & support with emphasis on:

- Maximizing the efficiency of the staff
- Automated tools
- Increasing appraisal accuracy, uniformity, and analysis capabilities.
- Fully integrating with GIS technology
- Providing the utilities and flexibility to accommodate the changes that are inherent with an appraisal district
- Providing the avenue for continued excellent service to our taxpayers and taxing units in the most cost efficient manner
- Ability to integrate with new technologies
- Cloud Hosted / Offsite
- Disaster Recovery
- Automatically scaling processing
- Strong online presence
- Remain current on legislative changes and updates
- Parallel operation with existing system until all functions and features are proven
- Satisfying the proposed milestones
  - Submit RFP May 2024
  - Narrow field to 3 possible vendors June 2024
  - Award proposal to vendor July 2024
  - Have a contract in place by August 2024
  - Begin data conversion December 2024/January 2025
  - Testing of Key Processes April 2025
  - Have complete transition by August 2025

INTRODUCTION

The purpose of this document is to provide Tarrant Appraisal District (TAD) with a strategic tool for acquiring and implementing a CAMA (Computer Assisted Mass Appraisal System) outlined above. This document will be used as an instrument to evaluate and select the most appropriate computer software and hardware system for Tarrant Appraisal District to assure the maximum benefit of their investment in time, money and human resources.

Tarrant Appraisal District is seeking to enhance overall communications and improve the effectiveness of the entire organization and better serve the community. To that end, TAD is soliciting proposals for a new comprehensive, fully integrated, software and

hardware system to replace the existing systems currently in use. The new system will include, but is not limited to, hardware and software for automated mass appraisal administration in accordance with Texas State Law, Texas Property Tax Code, State Comptroller's Office Property Tax Division and USPAP (Uniform Standards of Professional Appraisal Practice). The new system will also include document archival hardware and software, document imaging software, and full integration with our current Geographic Information System (GIS). The terms "new system", "software system", and "new software system", "new comprehensive software and hardware system" will all have the same meaning, as defined by this paragraph, throughout this document.

TAD receives funds on a quarterly basis from 72 taxing units (entities). TAD in one of the three largest districts in the state of Texas and currently has 1.6 million parcels and around 200 employees and serves the entities and taxpayers of Tarrant County. TAD is currently using an Aumentum software product provided by Harris Computer. In order to continue to accomplish our goals and minimize increased personnel costs, TAD must have a vendor and vendor's software system that will completely and efficiently serve our current and future needs. Equally important to TAD is the ability of the system to accommodate future advances in technology and growth.

TAD anticipates the acquisition of all additional required hardware and software license agreements through this RFP. The vendor should specify the type and cost of each acquisition plan the vendor offers. It is TAD's intent to greatly improve and enhance productivity and control the cost of data processing.

TAD is only interested in proposals that offer a total solution for automating all functions of TAD the total solution must also include query tools, form processing, report generating capabilities, and an online presence meeting the legislative mandates. TAD prefers that the vendor be the original author and support organization for all application software. Any reliance on third party software or vendors must be clearly defined in all responses.

TAD will accept proposals for turnkey total solution systems. The successful vendor will be considered the prime contractor. TAD requires that the prime contractor obtain all hardware and application software licenses, install all hardware, convert TAD databases and train TAD staff. Training must cover all aspects of operations, usability and best practices. The software must provide the staff with the capability for management of all processes in TAD, relying on the proposer to assist in daily and annual processes if necessary.

CURRENT TECHNOLOGY INFRASTRUCTURE

TAD utilizes a diverse range of computer and network technology. For computing there is a total 486 windows based workstations 180 servers, 60 physical servers, 40 CAMA

centric servers. The network consists of both a physical network supported by 7 switches and a wireless network with coverage throughout the building.

CURRENT BENCHMARK STATISTICS

For the purpose of this document TAD is providing the following approximate benchmark statistics which are representative of the current CAMA software's workload.

- 130 Field appraisers
- 70 Support staff
- 30 Concurrent ARB hearings
- 200,000 Annual ARB protests
- 800 Arbitrations
- 2,000 Active lawsuits
- 600,000 Residential properties
- 60,000 Commercial properties
- 50,000 Business personal properties
- 1,200,000 Mineral accounts
- 1,910,000 Total accounts

II. GENERAL REQUIREMENTS

Modern Technology

The reason for procurement is to accommodate the expanded requirements of our operations, expand capabilities, increase data security, and secure a system that allows us to take full advantage of the latest advances in computing and information processing technology.

The new system must satisfy the following requirements:

- Be responsive to the functional needs of departments.
- Be sufficiently flexible in both functional and technical designs to easily accommodate future changes as required by Texas State Legislature, changes in technology as well as business environment and other industry vendors.
- Must operate efficiently such that operations meet the performance demands of all users internally and externally to TAD.

Incorporate advances in computing and communications technology, such as:

- Current technology for application development
- Distributed and on-line data entry
- Structured systems design (fully normalized)
- Tools to create ad-hoc reports
- Capability to integrate with Scanning, Imaging, GIS databases, handheld Appraisal applications, and any future Relational Data Base Management System (RDBMS) compliant products
- Capability to FTP (File Transfer Protocol), import and export data accurately.
- Provide multiple database backups to ensure no data loss.
- Provisions for security control ensuring blocking of non-certified access.
- Provisions for disaster recovery and backups as well as checkpoints, should the application fail, ensuring no loss of data.
- Provide internal checks to ensure no loss of accounts or unintentional data changes.
- Capability to support online applications:
  - Appeals process
  - Informal value negotiation
  - ARB meetings
  - Electronic communication
  - Electronic Appraisal Notices
  - Application filing
  - API's
  - Microsoft 365
  - One Drive

Compliance

The new software system must support mass appraisal functions according to Texas State Law, Texas Property Tax Code, Texas Property Tax Assistance Division rules and USPAP standards.

Proven and Progressive

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

Integration

The key to the new software package is to apply full integration of all components or modules. These components should share information and thus reduce duplicative data entry and storing of redundant information. The information stored should be normalized using the Rules of Data Normalization.

Innovative

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

Maintenance

The Vendor will be required to engineer, design, program, install, convert data, test and maintain the new system that will provide complete services for TAD. TAD will accept proposals for turnkey total solution systems only. Vendor must be the sole responsible party throughout the delivery, installation, training, warranty, and maintenance periods. Any subcontractor utilized by the Vendor must be identified in the proposal with description of the assignments they will perform. A change of subcontractors throughout the installation, warranty, or maintenance periods requires the prior written approval of TAD. The Vendor will have ultimate responsibility for all subcontractors utilized for this project. The Vendor must provide a project manager as a single point of contact for TAD throughout the planning and implementation of the project.

III. PROPOSAL EVALUATION PROCEDURE

Delivery Information

TAD must receive three printed copies, and one digital version pdf format on USB drive of every proposal, in sealed envelope(s) with proper identification no later than June 10, 2024 at 3:00 pm. Requests for extensions of the closing date or time will NOT be granted. Partial bids will not be accepted. Proposals arriving late will not be considered. Vendors should allow sufficient mailing time to insure the timely receipt of the proposal.

Address proposals to:

Grady Ewing – Quality Assurance Manager
Tarrant Appraisal District
2500 Handley-Ederville Road
Fort Worth, Texas, 76118

Mark Envelope: MASS APPRAISAL SYSTEM PROPOSAL DO NOT OPEN UNTIL June 10, 2024 at 3:00 pm

Vendor Information

Vendors must submit information about the organization, including:
1. description of the company
2. parent or subsidiary status
3. description of all business activities engaged in by Vendor
4. number of employees
5. complete list of customers in Texas currently utilizing the product proposed

Vendor Business Philosophy

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

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

Vendor Background and Qualifications

TAD will only enter into an agreement with a reputable firm capable of support with skilled and fully trained technicians capable of performing a first class installation and conversion in accordance with standard industry practices. All Vendor technicians must be experienced with the programs and equipment they are to install and /or support.

The Vendor must have installed, converted, supported and maintained the product(s) offered to the District for a minimum three (3) years. The vendor must provide a history of the versions of the system, including dates when each version was released and the features that were implemented in each of the two prior versions. The vendor must be able to accommodate an office and project of our size or greater and demonstrate where they have a functioning system that has successfully completed three Appraisal Cycles.

Manufacturer Affiliation

Vendor must be the original author and developer of the source code offered for the CAMA software system.

Reference List

In order to meet the long-term requirements of TAD, the prospective vendors must demonstrate their experience in Texas Appraisal Districts & County Tax Offices.

1. The vendors should include a list of all Texas Appraisal Districts & County Tax Offices currently running the proposed application software in Texas.

2. The vendors should include a list of all Texas Appraisal Districts & County Tax Offices currently running the proposed application software outside Texas.

3. The vendors should include a list of all Texas Appraisal Districts & County Tax Offices currently running any legacy software in Texas.

4. If Vendor has no customers in Texas, Vendor should state that fact and provide a list of all out-of-state customers using Vendor's system similar to that which is being proposed.

5. Vendor must provide a list of references from a minimum of three (3) clients. Each reference solicited must be a paying customer external to the Vendor's organization. The Vendor must have supported and maintained the referenced systems or provide details of support and maintenance if not fully supported by the Vendor. The Vendor must have been the original developer of the referenced systems and/or provide the history of the features that

were integrated from other vendors. For listed references, include company/organization name and address of installation, description of software installed and the name and telephone number of the contact person.

Registration of Vendor

Any corporation conducting business with TAD shall be on file with the Secretary of State, State of Texas, as being incorporated under the Texas Business Corporation Act, or, if a foreign corporation, have procured a certificate of authorization for the right to transact business within the State. If Vendor is a limited partnership, it shall have on file with the Secretary of State, its certificate for the formation of a limited partnership as required by the Texas Uniform Limited Partnership Act, Article 6132a, V.A.C.S. Vendors shall provide their certificate of registration number on the proposal sheet.

Submission of Proposals

Vendors desiring to submit proposals in response to the request must comply with all mandatory submission requirements set out in this document. Failure to comply with any section will subject the proposal to immediate rejection. However, any mandatory submissions are not the sole requirements. All conditions and requirements throughout this request are considered binding.

Multiple Proposals

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

Authorization to Bid

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

Submission of Vendor Contracts

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

Vendor Inquiries

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

Grady Ewing – Quality Assurance Manager, GEwing@tad.org

Proposal Cost Errors

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

Product Information

Complete product information and descriptive literature shall be submitted with the proposal. Information submitted shall be sufficiently detailed or substantiate that offered products meet or exceed the specifications. Vendor is hereby put on notice that all information submitted according to this requirement would be incorporated by reference in the contract document arising out of Vendor's response and may subject to express contract warranties.

Benchmark Criteria

Vendors are strongly encouraged to provide benchmark statistics and additionally qualified Vendors may be asked to demonstrate their products to TAD. Vendors selected for product demonstrations must demonstrate that their product meets their response to the proposal. Failure to demonstrate that the product meets specifications will cause rejection of Vendor's proposal.

Installation, Integration and Testing

Vendors shall provide a method of parallel operation with the existing system.

Vendors shall provide a detailed installation, implementation and testing schedule for hardware, application software, database conversion and training with the proposal. All hardware purchased shall be installed within sixty days of contract award unless otherwise specified by TAD. After completion of testing and training the application of the software will begin as defined in the Vendor proposed installation plan.

Proposal Evaluation

TAD will evaluate all proposals and The TAD Board of Directors will make the final evaluation of top proposals. Proposals that do not meet mandatory requirements shall be rejected. Proposals meeting the mandatory requirements shall be further evaluated on overall costs and ability to meet the long-term needs of TAD The term "overall costs," as used in this paragraph, shall be interpreted to include -- but not be limited to -

- the cost of installment, conversion, training, product price, expansion capabilities of hardware, facility modifications required to house and operate the hardware and impact on staff.

Rejection of Proposals

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

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

TAD reserves the right to reject any or all proposals, to waive technicalities or formalities, and to accept any proposal deemed to be in the best interest of TAD If TAD receives no valid proposals, TAD reserves the right to negotiate on the best terms and conditions at the best possible prices.

Legal and Contractual Issues

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

Terms of Payment

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

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

Delivery

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

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

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

Acceptance

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

Assignment, Use and Resale

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

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

Termination

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

Execution Authority and Legal Assistance

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

Product Warranty

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

IV. SCORING

Scoring is intended to assist in identifying the top response candidates to the RFP and a high score does not guarantee the contract award. Top responses will be submitted the TAD Board of Directors and given the opportunity for a short demonstration.

Submissions which have been evaluated to meet the requirements under section V Proposal Requirements will then be scored based on the Contributory Percentages shown below. For the percentages which reference other sections their contribution will correlate with the number of questions to which they have answered yes in that section.

Contributory Percentages

- Has the proposed solution been implemented in an appraisal district with 200,000 or more parcels (10%)

- Has an appraisal district used the proposed solution to finish 3 or more appraisal cycles (10%)

- Is the proposed solution an existing product used in Texas, Colorado, Florida, or Washington (10%)

- Does the proposed solution use automatic dynamically scalable processing (10%)

- Does the proposed solution satisfy the parameters in section "VI. GENERAL SOFTWARE DESIGN" (10%)

- Does the proposed solution satisfy the parameters in section "VII. APPRAISAL DISTRICT OPERATIONAL CAPABILITIES" (10%)

- Does the proposed solution satisfy the parameters in section "VIII MASS APPRAISAL CAPABILITIES (15%)

- Does the proposed solution satisfy the parameters in section "IX. PERFORMANCE GUIDELINES" (15%)

- Total cost (10%)

V. PROPOSAL REQUIREMENTS

All proposals must specifically include the following or they will be subject to rejection.

Timeline

All proposals must include a proposed timeline depicting key milestones during the conversion and implementation process.

Hardware

All proposals must include detailed listings with itemized cost for any additional hardware which does not exist on site that is required to ensure all features, functions, and performance parameters of the proposal are met.

Software

Proposed software and system configuration must operate offsite / cloud based and support in excess of 200 concurrent users (133 appraisal and 67 support staff as of today) with unit costs, if any, for/of next user license agreement.

Training

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

Parallel Operation

The Vendor should specify their method of supporting parallel operation during the conversion through final acceptance of the new solution.

Installation and Conversion

The Vendor shall provide for Parallel operation with the existing system until the proposed solution has been proven on site by TAD staff. The Vendor should specify the amount of time required for the installation and conversion process. Responsibilities of TAD must be specified for assistance in installation, cabling, networking interfaces, database conversion and training. The Vendor shall provide from their organization a Product Conversion Manager who is experienced with appraisal and understands the vendor's product. The Vendor shall specify the frequency of on-site visits by the Product Conversion Manager during the conversion process, it is the belief of TAD that frequent on-site visits will provide for greater success.

Software/Hardware Maintenance

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

GIS Mapping System

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

Cost Estimator Integration

Being a critical tool TAD requires the ability to integrate with construction cost estimators for residential and commercial properties. Indicate which cost estimators you support, and if the price is included or if a separate third party engagement is required.

VI. GENERAL SOFTWARE DESIGN

A "YES" or "NO" RESPONSE TO ALL SECTIONS IS MANDATORY

Instructions:
1. If your software currently meets all requirements set forth in the statement or question and requires no modification, then answer "YES".
2. If you are unable to meet all requirements, then answer "NO".
3. If the software does not currently meet all requirements set forth in the statement or question but you are willing to modify the system, then answer "NO" <u>and</u> include an estimated cost for providing the requested capability.

1. Application Design	Yes	No	Cost to Modify
1.1. Does the vendor, within current maintenance costs, ensure legislative compliance by the bill effective date or as soon as possible allowed by the release schedule?.			
1.2. Is the application cloud based?			
1.3. Is the application written for a dynamically scaled computing environment?			
1.4. Does the application support distributed processing server technology?			
1.5. Does the application allow for a fully redundant Windows & SQL Clustering solution to minimize downtime?			
1.6. Is the application developed for a Windows-based network environment?			
1.7. Does the application employ a Graphical User Interface for ease of use?			
1.8. Does the application have online help? If so…			
1.8.1. Is the help context-sensitive?			
1.8.2. Does it use the standard windows "What's This?" functionality?			
1.8.3. Are there additional tools to allow direct contact with the support staff?			
1.8.4. Does the application have step by step "How To's" developed for common functions?			
1.8.5. Does the application have step by step "How To's" developed for Texas tax calendar functions?			
1.8.6. Is the online help updated when functionality is added or changed?			
1.8.7. Does the system allow for TAD-specific procedures to be added to the online help?			
1.9. Does the application use a generally available report writer for all its forms and reports?			
1.9.1. If so, can the user make edits to the forms and reports as needed?			
1.10. Can the data be exported using industry standard formats?			
1.11. Is the application installed using standard methods in their respective platforms?			
1.12. Does the vendor utilize a structured Release Deployment Plan in order to schedule deployment and protect the end users from instability?			
1.13. Are new releases automatic?			
1.14. Is the application fully compatible with most internet browsers?			
1.15. Does the application support a read-only or kiosk mode for use in the customer service lobby?			
1.16. Does the product support user API's?			
1.17. Does the product support VOIP phone system integration?			
1.17.1. Does the integration allow for accounts to be grouped and searched by caller ID?			
1.18. Is the application capable of Optical Character Recognition (OCR)?			

2. **Database Design**	Yes	No	Cost to Modify
2.1. Does the application maintain a one-to-many relationship between the owner table and the property/parcel table? (Can an owner have multiple properties?)			
2.2. Does the application maintain a one-to-many relationship between the property/parcel table and the owner table? (Can a property have multiple owners without splitting it?)			
2.3. Does the application allow for ownership % to be applied and maintained at the land, improvement and personal property segment level?			
2.4. Is the number of taxing entities allowed per account unlimited?			
2.5. Does the application allow for entity % to be applied at the property level? For example, a property is 50% inside city limits – and not have to split the account.			
2.6. Does the application allow for entity % to be applied and maintained at the land, improvement and personal property segment level?			
2.7. Does the application allow for grouping properties for the purpose of apportioning exemptions? (Can a MH property be grouped with the land property or properties to apply the HS exemption without combining the properties?)			
2.8. Does the application allow for grouping properties for the purpose of apportioning value (Income Valuation, Economic Units, Effective Acres, Special Appraisal Distribution)?			
2.9. Does the application allow for prorating exemptions?			
2.9.1. If so, does the property allow for multiple prorations on the same account in the same tax year?			
2.10. Does the application support storage of tax payment status from the tax office?			
2.11. Does the application maintain a complete set of appraisal history per tax year?			
2.11.1. Is this accomplished without intervention by technical support personnel?			
2.11.2. Does this include land and improvement detail appraisal information?			
2.11.3. Does this include pricing schedules by tax year?			
2.11.4. Does this also include neighborhood adjustments by tax year?			
2.11.5. Does this also include subdivision adjustments by tax year?			
2.11.6. Does this also include cost multipliers and local multipliers by tax year?			
2.11.7. Does the application allow for calculations of value to be performed on a previous year account?			
2.12. Does the application capture a complete set of appraisal information when a property is sold?			
2.12.1. If so, does this include land and improvement detail appraisal information?			
2.12.2. Can land and improvement detail information be modified without affecting current values?			
2.12.3. Does the application allow for configurable user warnings to manage data entry affecting new value, sales or ARB settlement offers?			
2.13. Does the application capture new value?			
2.14. Does the application capture new value as a result of construction completion?			
2.15. Does the application allow for calculations of value to be performed on appraisal information captured at the time of sale?			
2.16. Does the application allow property comparison and ratio calculations with the appraisal information captured at the time of sale, in addition to the current appraisal information?			
2.17. Is the database SQL-compliant? If so…			
2.17.1. Can it be accessed using generally available ODBC drivers?			
2.18. Can it access other SQL-compliant databases such as GIS servers?			
2.19. Is there a graphical user interface for querying the database(s)?			
2.20. Is the complete data-dictionary available for querying?			

2.21. Does the application allow a user to track and report on the value status of any account?

2.22. Does the application allow a user to reconcile multiple valuation methods to determine a final value, including cost, income, sales values?

2.23. Has a client experienced the total loss of access and/or visibility to an account(s)? (Example: No primary accounts)

    2.23.1. If so, could the account be retrieved or restored to the database by the vendor in less than 48 hours (about 2 days)?

2.24. Does the system allow a one-to-many relationship between an official document (deed) table and the property/parcel table?

2.25. Does the system maintain a chain of title?

2.26. Does the system allow secondary documents to be recorded in parallel with the official document? (Examples: Life Estate, Heir Owner, Contract for Deed, Ground Lease, etc.)

    2.26.1. If so, does the system allow secondary parties to be listed on an account?

2.27. Does the system maintain a person's date of birth in a separate field from an entity's date of establishment?

2.28. Does the system maintain a person's date of death in a separate field from an entity's date of dissolution?

2.29. Does the system recalculate values for only tax years affected by the change?

2.30. Does the system maintain exemption and other value modifier calculations as required by Texas legislation per tax year?

    2.30.1. If so, does the system automatically adjust exemption amounts for added value or new construction?

    2.30.2. If so, does the system automatically adjust tax ceilings for added value or new construction?

2.31. Does the system allow exemptions to be associated with a specific property owner?

2.32. Does the system allow for an exemption type to be applicable across multiple property types?

2.33. Does the system allow exemptions to be awarded as a percentage of appraised value?

    2.33.1. If so, does the system allow exemptions to be awarded as a percentage of land, improvement, interest, or asset?

2.34. Does the system allow exemption amounts or percentages to vary per taxing entity?

2.35. Does the system allow exemption amounts or percentages to vary per taxing entity per year?

    2.35.1. If so, does it require a new exemption entry each time the amount or percentage changes?

2.36. Does the system allow exemptions or other value modifier calculations to be automatically applied based on the existing data and state laws?

2.37. Does the system allow configurations that generate alerts and/or prevent data entry errors?

2.38. Does the system allow flagging an account for a future inspection and reason?

2.39. Does the system allow flagging an account for inspection by multiple departments?

2.40. Does the system track mailed exemption applications or other forms?

2.41. Does the system maintain images of the received application?

2.42. Does the system track the latest application mailed date?

2.43. Does the system track the latest application received date?

2.44. Does the system track late applications?

2.45. Does the system track actions taken on applications?

2.46. Does the system track applicant name for those which do not match owner name?

2.47. Does the system track occupancy date?

2.48. Does the system track income-Producing Percentage?

2.49. Does the system track owner Not of Record?			
2.50. Does the system track qualifying Trust?			
2.51. Does the system track beneficiary Name(s)?			
2.52. Does the system track beneficiary Date of Birth?			
2.53. Does the system track cooperative Housing?			
2.54. Does the system track disability Start Date?			
2.55. Does the system track disability End Date?			
2.55.1. Does the system allow for an automatic action to be taken as of the end date?			
2.56. Does the sytem track veteran Disability Rating?			
2.57. Does the system track total and Permanent Disability?			
2.58. Does the system track participating Taxing Units?			
2.59. Does the system allow the user to enter future exemption start dates?			
2.60. Does the system allow the user to enter future exemption end dates?			
2.61. Can the system produce and track exemption estimates for the estimates roll within the production database?			
2.62. Does the system maintain an exemption or other value modifier change log?			
2.63. Does the system calculate and maintain appraised value limitations?			
2.64. Does the system calculate and maintain tax ceilings and freeze years?			
2.65. Does the system calculate and maintain tax ceiling transfer ratios?			
2.66. Does the system allow tax ceiling and freeze year participation to vary per taxing entity?			

VII. APPRAISAL DISTRICT OPERATIONAL CAPABILITIES

3. Parcel/Account Search Information	Yes	No	Cost to Modify
3.1. Can the Parcel/Account be accessed by all of the following?			
3.1.1. Account Number?			
3.1.2. Geographic Number?			
3.1.3. Account Type (Real, Personal, Mineral, Mobile Home, Auto)?			
3.1.4. Include deleted and reference properties?			
3.1.5. By Year?			
3.1.6. Situs?			
3.1.7. Abstract/Subdivision, Block, Lot?			
3.1.8. Neighborhood Code or Description?			
3.1.9. DBA?			
3.1.10. Map ID?			
3.1.11. Building Permit Number?			
3.1.12. Mineral Lease Number?			
3.1.13. Previous ownership?			
3.1.14. Business type (NAICS)?			
3.1.15. Dealer's license number?			
3.1.16. Aircraft tail number?			
3.1.17. Owner/Taxpayer ID?			
3.1.18. Owner/Taxpayer Name?			
3.1.19. Owner/Taxpayer First Name?			
3.1.20. Owner/Taxpayer Last Name?			
3.1.21. Owner/Taxpayer Mailing Address?			
3.1.22. Previous Taxpayer Name?			
3.1.23. Agent's ID?			
3.1.24. Agent's Name?			
3.1.25. Agent's First Name?			
3.1.26. Agent's Last Name?			
3.1.27. Agent's Mailing Address?			
3.1.28. Entity?			
3.1.29. GIS tools?			
3.1.30. Year Range?			
3.1.31. Street Number Range?			
3.1.32. Block Range?			
3.1.33. Lot Range?			
3.1.34. Any Previous Taxpayer Name?			
3.1.35. Exemption Start Date?			
3.1.36. Exemption End Date?			
3.1.37. Deed Instrument Number?			
3.1.38. Deed Instrument Number Range?			
3.1.39. Deed Date Range?			
3.1.40. Phone Number?			
3.1.41. Username?			
3.1.42. Entry Date Range?			
3.1.43. Department?			
3.1.44. Exemptions?			
3.1.45. Property Use?			
3.1.46. Zoning?			

3.1.47. Value Status? (for tracking the property through appraisal cycle)
3.1.48. Field Assignment Group? (For mobile appraisal device)
3.1.49. Building Permit #?
3.1.50. UDI Properties?
3.1.51. Deed Volume/Page/Number?
3.1.52. Improvement Type?
3.1.53. State Code?
3.1.54. Map ID?
3.1.55. SIC Code?
3.1.56. Mobile home Serial, Title or HUD number?
3.1.57. Deed Volume, Page of Number?
3.1.58. Configurable Code for Grouping Properties? (Property Group Code)
3.1.59. ANY COMBINATION OF THE ABOVE?
3.2. Does the system also allow for a generic/universal search using one entry box?
3.3. Does the system have an advanced search?
3.4. Does the system allow the use of wildcards (%, *) in the search criteria?
3.5. Do all search results display basic data fields, including account number, situs, owner name, account status?
3.6. Can displayed result fields be sorted, rearranged, added, or removed according to the user's preferences?
3.7. Does the system display a message if no results are found?
3.8. Does the system display the number of results found and the time taken to return the search results?
3.9. Does the system have an adjustable limit for the maximum number of results returned?

	YES	NO	Cost to Modify
4. Taxpayer Records			

4.1. Does the application allow multiple owners per parcel/account?
4.2. Does the system allow for official documents to be entered out of chronological order?
4.3. Does the system allow for a user to undo a deed entry?
4.4. Does the system allow a user to update one mailing address for multiple accounts?
    4.4.1. If so, can the user specify what accounts are updated?
4.5. If so, are the interests and values maintained at the account level
4.6. Does the system support multiple addresses per taxpayer?
4.7. If so, does the system allow the user to indicate which address is for mailing?
4.8. Does the system support multiple phone numbers per taxpayer?
4.9. Does the system support CASS Certification information?
4.10. Does the system allow for document images be scanned or attached to taxpayer records?
    4.10.1. Does the system allow for official documents to be entered out of chronological order?
4.11. Does the system allow for identification or flagging International Addresses?
4.12. Does the system provide the ability to flag returned mail?
    4.12.1. Does the system provide for the mailing address to default back to the situs address after a set number of mail returns?
4.13. Does the system provide importing of national change of address (NCOA) data?
4.14. Does the system allow for identification or flagging of "confidential" owners such as police officers?
4.15. Is confidential and PII stored in an encrypted format?
4.16. Are property descriptions maintained distinctly by year?
4.17. Does the system support 10 or more taxing entities on a single account?

	Yes	No	Cost to Modify
4.18. Does the system support 8 or more exemptions on a single account?			
4.19. Does the system support 100 or more taxing entities?			
4.20. Does the system support 50 or more exemptions?			
4.21. Does the system have an integrated online exemption application tool?			
4.22. Can an account be inactivated or deleted? If so…			
4.22.1. Can it be recovered at a later date?			
4.22.2. Can an account be inactivated or deleted for a future date?			
4.22.3. Can a deleted account be searched?			
4.22.4. Can an account be activated or created for a future date?			
4.22.5. Does the system allow you to create or delete an account as of a specific date without changing the system's effective date?			
4.23. Does the recover process restore the original improvement and land appraisal information?			
4.23.1. If so, is a history of permits maintained?			
4.24. Does the system support multiple Situs Addresses?			
4.25. Does the system support multiple Doing Business As (DBA)?			
4.26. Does the system support multiple email addresses?			
4.27. Does the system track agreement for taxpayer to receive Electronic Communication?			
4.27.1. If so, Does the system indicate which type of communication will be electronic? (E.g. Appraisal Notices, Tax Statements, Online Appeals)			

5. Splits and Merges	Yes	No	Cost to Modify
5.1. Does the system provide the ability to split property through the use of a Help Wizard?			
5.2. Does the system have a GIS tool to process splits and merges?			
5.3. Does the system have a splits/merge workflow process?			
5.4. Does the system support copying land segments, improvements, and images to other accounts?			
5.5. Can the user see all history involved with all splits of a property?			
5.6. Does the system provide the ability to merge property through the use of a Help Wizard?			
5.6.1. If so, can the user see all history involved with all property merges?			
5.7. Does the system provide the ability to mass create new properties through the use of a Help Wizard?			
5.8. Does the system allow for certain data of BPP properties such as situs and entities to be linked and imported from the real property at that same location?			
5.9. Does the system provide the ability to link properties?			
5.10. Does the system provide the ability to split property through the use of a Help Wizard?			
5.10.1. If so, can the user see all history involved with all splits of a property?			
5.10.2. If so, can the user see all history involved with all property merges?			
5.11. Does the system allow a user to undo splits or merges?			
5.12. Does the system allow splits or merges to occur out of chronological order?			
5.13. Does the system allow the user to view the properties to be split in GIS?			
5.14. Does the system allow the user to view the properties to be merged in GIS?			

6. TIF Zone Data	Yes	No	Cost to Modify
6.1. Does the system track TIF zone data (Base Year, Expiration year, Description or Name, Code, type, participating entities)?			
6.2. Does the system track Base Market and Base Taxable value by entity?			
6.3. Does the system allow for correcting the base year values?			
6.4. Does the system generate reports and letters for the related entities?			
6.5. Does the system generate summary and detail reports?			
6.6. Does the Summary report show the Base and the Current year values and increment?			
6.7. Can reports be run for specific entities?			
6.8. Are the reports user configurable allowing adding and removing fields?			
6.9. Does the report allow showing the amount of value under litigation?			
6.10. Does the report allow showing the amount of value under ARB review?			
6.11. Does the report show certified vs non-certified values?			
6.12. Does the report show the value of new construction?			
6.13. Does the report show exempt value?			
6.14. Does the report show exempt value by exemption type?			
6.15. Does the report show a count of properties for the current year?			
6.16. Does the report show a count of properties for the prior year?			
6.17. Does the report show a count of properties for the base year?			
6.18. Does the report show a grand total of all the accounts?			
6.19. Does the report show the base year?			
6.20. Does the presence of a TIF code display on the property summary screen?			
6.21. Does property split or plat process flag accounts with a TIF value or provide a way to distribute the base value?			
6.22. Is the system able to track changes in total base value for a TIF?			
6.23. Is the system able to display TIF properties on the GIS viewer?			

7. Corrections to the Certified Roll	Yes	No	Cost to Modify
7.1. Does the system keep certified history by year?			
7.1.1. Does the system track 10 years of certified history?			
7.2. Does the system allow for corrections, additions or deletions to the certified roll?			
7.2.1. Does the system allow for modification of 10 prior years?			
7.3. Does the system allow for omitted property and omitted improvement tracking for the purpose of correcting the roll?			
7.4. Does each supplemental roll only include changes made since the last supplemental roll was certified?			
7.5. Can the roll's date range be specified by the user?			
7.6. Can users continue data entry while the roll is being generated?			
7.7. Does the system have an automated process of transferring changed information to collections for bill adjustments to take place?			
7.7.1. Does the system allow for 10 years to be "transferred" to collections?			
7.8. Does the system keep full appraisal information by year? (Does the system keep a full complement of land, improvement, and business personal property information by year?)			
7.8.1. If so, can a property be "recalculated" for a prior year without affecting current values?			
7.9. Does the system print a supplemental roll listing all property involved in the corrections?			
7.9.1. Can this roll be grouped by entity?			
7.9.2. Can this roll be grouped by year?			

	Yes	No	Cost to Modify
7.9.3. Can this roll be grouped by supplemental action? (i.e. adds, changes, deletes)			
7.9.4. Does this roll print a summary totals page indicating the gains or losses for each entity?			
7.9.5. Can this roll be re-printed on demand?			
7.9.6. Can this roll be re-printed even if subsequent rolls have been accepted?			
7.9.7. Does the system generate an Adjusted History Total after each supplement?			
7.9.8. Can multiple supplement groups be opened at the same time?			
7.10. Does the system allow for a "future supplement" to be started to allow for the 30-day notice requirement?			

8. Agent Identification	Yes	No	Cost to Modify
8.1. Can agents be created on the system (AoA or Appointment of Agent)?			
8.2. Does the system allow users to easily, two clicks or less from the main account, identify the authorities assigned to an agent prior to assisting a customer?			
8.3. Can the system support all the same contact fields as it does for Taxpayers?			
8.4. Can multiple agents be assigned to one parcel?			
8.5. Can multiple parcels be assigned to one agent?			
8.6. Can authorities be defined on an agent for a parcel?			
8.7. Can agents be authorized on accounts in mass?			
8.8. Can agents be revoked in mass (RoA or Revocation of Agent)?			
8.9. Can it keep chronological AoA/RoA history at the account level?			
8.10. Can it analyze entered data and auto determine if the information is a duplicate?			
8.11. Can it analyze entered data and auto determine if the agent/agency has already been revoked?			
8.12. Can it post duplicate submittal information in chronological order?			
8.13. If an RoA has been submitted prior to the AoA being submitted, can it maintain that information and auto revoke the AoA when it is submitted?			
8.14. Can authorization by revoked on Dashboard by property owner or agent?			
8.15. Can it automatically send notifications to the affected parties upon the processing of AoA/RoA?			
8.16. Does it have OCR ability to read and enter data from scanned documents?			
8.17. Does it automatically update and produce all the Comptroller required reports and surveys?			
8.18. Does the system allow for document images be scanned or attached to agent records?			

9. Import Information	Yes	No	Cost to Modify
9.1. Does the system allow importing appraisal data?			
9.2. Does the system allow importing building permits?			
9.3. Does the system allow importing CASS data?			
9.4. Does the system allow importing corrected Situs Zip Codes? (new post offices created)			
9.5. Does the system allow importing mailing address information provided from the USPS?			
9.6. Does the system allow importing owner identification information from TXDPS or similar agency?			
9.7. Does the system allow importing death information from TX Dept of Vital Statistics or similar agency?			
9.8. Does the system allow importing mineral data from multiple vendors?			
9.9. Does the system allow custom imports and mapping of tabular data files?			
9.10. Does the system allow importing mortgage company records?			

9.11. Does the system include preconfigured imports all the major appraisal vendors standard exports?

9.12. Do all imports from appraisal vendors capture new value?

9.13. Do all imports from appraisal vendors capture ownership changes?

9.14. Does the import tool generate custom change reports showing before and after values?

9.15. Does the system allow for the import of collection and tax payment events?

9.16. Does the system import exemption data from appraisal vendors?

9.17. Does the system import abatement data from appraisal vendors?

10. Export Information	Yes	No	Cost to Modify
10.1. Does the system allow exporting application data?			
10.2. Does the system allow exporting appraisal information?			
10.3. Does the system allow exporting CASS data?			
10.4. Does the system allow exporting Situs Address for zip code correction?			
10.5. Does the system allow exporting ownership changes?			
10.6. Does the system allow exporting property summary data?			
10.7. Does the system allow exporting shared property data?			
10.8. Does the system allow exporting sales submission data?			
10.9. Does the system allow exporting state reviewer data?			
10.10. Does the system allow exporting truth-in-taxation data?			
10.11. Does the system allow for modification and adding fields to existing exports?			
10.12. Does the system allow users to develop custom exports?			
10.13. Does the system allow exports to be scheduled and processed automatically?			

11. Event Tracking	Yes	No	Cost to Modify
11.1. Does the system track all system-defined events for a property such as notice generated, protest generated, ownership transfers, etc.?			
11.2. Does the system keep an exact copy of the appraisal notice that was generated?			
11.3. Does the system allow for user-defined events?			
11.4. Does the system display in a chronological order the events attached to a property?			
11.5. Does the system allow the user to see events for a property?			
11.6. Does the system allow the user to see the appraisal and collections events for a property at the same time?			
11.7. Does the system allow the user to attach any Windows objects (i.e., video, images, etc.) to an event for a property?			

12. Change Log Administration	Yes	No	Cost to Modify
12.1. Does the system allow identification of fields to be tracked when changed?			
12.2. Does the system allow viewing of all changes made to the fields being tracked?			
12.3. Does the system show a before and after picture of the fields that change?			
12.4. Does the system track changes to records even when performed outside of the application such as an update statement using SQL?			
12.5. Does the system allow for customizable change reports?			
12.6. Does the system for change reports of changes by specific users?			

13. User Identification	Yes	No	Cost to Modify
13.1. Does a person need a user ID to access the system?			
13.2. Is a user ID password validated?			
13.3. Does the system support a universal login / SSO?			
13.4. Does the system allow the user to reset and/or recover password using security questions?			
13.5. Can a user account be created to only have specific functions available to them on the system?			
13.6. Are rights and functions on the system specified at the user level?			
13.7. Does the system allow for rights and functions by user groups?			
13.8. Does the system allow for selection of different databases to log into as in the case when using a training database and a live database?			
13.9. Can an appraiser be created to only change specific state codes?			

14. Appraisal Notice Automation	Yes	No	Cost to Modify
14.1. Does the system include a comprehensive 25.19 notice selection wizard?			
14.2. Can the 25.19 notice form be printed in-house?			
14.3. Can the 25.19 notice form be exported to a print file?			
14.4. Does the system include a comprehensive 25.192 notice selection wizard?			
14.5. Can the 25.192 notice form be printed in-house?			
14.6. Can the 25.192 notice form be exported to a print file?			
14.7. Does the system include a comprehensive 25.193 notice selection wizard?			
14.8. Can the 25.193 notice form be printed in-house?			
14.9. Can the 25.193 notice form be exported to a print file?			
14.10. Does the system allow for notices to be mailed by property type (i.e. Real property go first -vs- Personal Property)?			
14.11. Does the system allow for multi-property notices?			
14.12. Does the system allow printing notices for owners or agents or both?			
14.13. Does the system provide the ability to code a property that will FORCE a notice to be mailed to this property during the Appraisal Notice selection process?			
14.14. Does the system provide the ability to code a property that will EXCLUDE the property from being selected for notification during the May Notice selection process?			
14.15. Does the system create an event indicating that a notice was mailed to the property owner or agent?			
14.16. Does the system automatically store an image of the appraisal notice that was mailed to the property owner or the agent?			
14.16.1. Can the stored image then be re-printed?			
14.17. Does the system record "ARB values" system wide at the time the appraisal notices are printed to serve as a reference point for comparison during the protest period?			
14.18. Does the system allow for custom queries to be used to selectively code properties to FORCE a notice to be mailed to this property during the Appraisal Notice selection process?			
14.19. Does the system allow you to work in a Future Year layer while in the protest season?			
14.20. Does the system allow all accounts to be moved to the future year even before certification?			
14.21. Does the system allow Notices to be published electronically? (Where the taxpayer or Agent can view the Notice online)			
14.22. Does the system allow Notices to be published to the Property Search website?			

14.23. Does the system have an integrated email notice module or Microsoft 365 integration?			

15. Certified Appraisal Roll Automation	Yes	No	Cost to Modify
15.1. Does the system allow for certifying the roll in less than 5 hours?			
15.2. Does the system allow for generating and tracking a certified estimate of the roll?			
15.3. Does the system print certified totals by entity with a separate total for "Under ARB Review" items?			
15.4. Can the appraisal roll be printed in-house with duplex capability on laser printers?			
15.5. Can the appraisal roll be exported to an ASCII file for offsite printing?			
15.6. Can the appraisal roll be exported to a fixed-length file for taxing jurisdictions?			
15.7. Can the New Year creation and commencement of work begin immediately after certification?			
15.8. Does the system print the State Reports in Laser Forms?			
15.9. Does the system export to the EDS format for submission to the state?			

16. Appraisal Review Board Processing (ARB)	Yes	No	Cost to Modify
16.1. Does the system have an Appraisal Review Board package?			
16.2. Does the system allow for multiple protest reasons under a single protest?			
16.3. Does the system allow for multiple protesters under a single protest?			
16.4. Does the ARB package have barcode or QR scanning?			
16.5. Does the system allow creating protests through a wizard?			
16.6. Does the system allow creating protests from an excel file?			
16.7. Does the ARB package provide scheduling tools?			
16.8. Can the user search by Property ID?			
16.9. Can the user search by Case ID?			
16.10. Can the user search by hearing date?			
16.11. Can the user search by appraiser?			
16.12. Can the user search by Status?			
16.13. Can the user search by Inquiry type?			
16.14. Can the user search by Date range?			
16.15. Can the user search by ARB Panel?			
16.16. Can the user search by status?			
16.17. Can the user search by Agent?			
16.18. Can the user update protest and hearing characteristics for multiple records from the search results?			
16.19. Does it automatically produce all the Comptroller required reports and surveys?			
16.20. Does the system automatically send all required text and email reminders and notices for hearings?			
16.21. If a 25.25d motion is being submitted on an account that has already had a S&W or a Chapter 41 value hearing with a determination, will it record the submission, update to the appropriate case status?			
16.22. Can it auto validate and record, upon the filing of a 25.25 motion or 41.411, account specific year, year specific, delinquency date, tax payment date(s) and amount(s)?			
16.23. Can it determine if the 25.25 motion is timely and code the case appropriately?			
16.24. Can it calculate/estimate the undisputed amount of taxes based on information provided on the motion form?			
16.25. Can it determine if the undisputed amount of taxes have been paid timely and code accounts appropriately?			

16.26. Prior to the scheduled hearing date, if the undisputed portion of taxes have not been timely paid, can it auto notify filer with correspondence designed to inform them of legal requirements necessary to proceed with a hearing?

16.27. As cases are being closed via a joint motion (JM), settlement & waiver(S&W) or hearing, by the authorized party, will it auto close all extraneous cases for those accounts filed by unauthorized parties?

    16.27.1. Will it auto notify filing party, on all extraneous cases that account has been closed by authorized party?

16.28. If protests are submitted by multiple parties for the same grounds and the account has already been closed via JM, S&W or hearing, by the authorized party, will it record the submissions, create the cases, update cases with the correct closed case status and auto notify all filing parties, as cases are being created, that they will not be scheduled due to previous closure by authorized party?

16.29. Is the data in the protest filing screen/wizard in the same order as on the Notice of Protest?

16.30. Does the system record type of hearing requested (in-person, affidavit, telephone, video conference)?

16.31. Can the cases be filtered and sorted by requested hearing type?

16.32. Can hearing type be changed/updated in mass?

16.33. If errors (ex: wrong year, wrong agent number) occur when ARB cases are created, can the errors be corrected?

    16.33.1. Can errors be corrected in mass?

16.34. Can a report be generated for all accounts ready for an Agreed Order?

16.35. Can a report be generated for all accounts ready for a Final Order?

16.36. Can Orders be generated in mass by Agent number?

16.37. At the account level, does the system track the call-in registration time for telephone hearing?

16.38. Does the system track when the telephone case is put into the panel room?

16.39. Does the system track when the hearing starts and stops?

16.40. At the account level, does the system track when the property owner/agent enters the waiting room for videoconference hearing?

16.41. Does the system track disconnections/interruptions?

16.42. Does the system track on whose end the disconnection/interruptions occurred?

16.43. Does the system track if an Affidavit/Unsworn Declaration has been uploaded to an account?

16.44. Does the ARB package keep track of all letters printed?

16.45. Does the ARB package allow for multiple properties which are part of the same economic unit on one protest?

16.46. Does the ARB package allow for multiple properties which are part of the same undivided interest on one protest?

16.47. Does the ARB package allow for multiple properties which are part of the same effective acreage group on one protest?

16.48. Does the ARB package allow for multiple properties which are part of the same homestead group on one protest?

16.49. Does the ARB package allow for scheduling for appraisers and ARB hearing?

16.50. Does the ARB package allow scheduling for offsite locations?

16.51. Does the ARB package keep the minutes of the meetings and the voting results and motions?

16.52. Can the user print a schedule for Appraiser meetings?

16.53. Can the user print a schedule for the ARB meetings?

16.54. Are all codes user defined and maintainable?

16.55. Is the ARB data kept by year indefinitely?

	Yes	No	Cost to Modify
16.56. Does the ARB package capture digital audio (MP3 format) directly to the ARB record?			
16.57. Does the ARB package support video conferencing?			
16.58. Does the ARB package capture video directly to the ARB record?			
16.59. Does the ARB package automatically generate a sales comp grid based on pre-defined parameters?			
16.60. Does this sales comp grid also have automatic adjustments of sales comp to subject to come up with an indicated value?			
16.61. Does the ARB package allow for a paperless ARB presentation showing protest information, sales comp grid, GIS comp grid, appraisal card etc.?			
16.62. Does the ARB package allow for configuration of an evidence packet specific to property or protest characteristics?			
16.62.1. If so, can the evidence packet be created for multiple protests at a time?			
16.62.2. Can the ARB package determine which evidence to generate for each protest?			
16.63. Does the ARB package allow for a paperless Taxpayer presentation?			
16.63.1. If so, can the Taxpayer presentation be accessed from the same record where the ARB presentation is accessed?			
16.64. Can the user quickly review prior year and current year property data and values side-by-side, along with percentage of change by year for hearing support?			
16.65. Does the system provide real-time hearing schedule updates?			
16.66. Doe the system allow staff to page for assistance during a hearing?			
16.67. Does the system allow non-value related protest determinations to be entered without changes to the notified or final market values?			
16.68. Does the system support a tax payment status import?			
16.69. Does the system support a tax office account live link from within the protest?			

	Yes	No	Cost to Modify
17. Online Appeals			
17.1. Does the system allow taxpayers to file a protest online?			
17.2. Does the property owner/agent Dashboard have a place for two way communication and does it capture and retain the communication?			
17.3. Can the user determine when the online system should be activated and deactivated based on the appeals cycle?			
17.4. Does the online protest update the system without user intervention? (The user does not have to manually enter the protest filed online.)			
17.5. Does the system allow The District evidence to be published online for the taxpayer?			
17.6. Does the system allow the taxpayer to submit evidence online?			
17.6.1. If so, is the evidence loaded into the system without user intervention?			
17.6.2. If so, are there security parameters in place to protect The District from viruses, large, or corrupt uploaded files?			
17.6.3. If so, is the deadline for uploading evidence user configurable based on hearing time or hearing status?			
17.7. Does the system allow the taxpayer to schedule a hearing online from The District's configured available dates?			
17.8. Does the system allow the taxpayer to schedule a hearing by location?			
17.9. Does the system allow a taxpayer to reschedule a hearing online?			
17.10. Does the system allow a taxpayer to withdraw a protest online?			
17.11. Does the system allow The District to offer a settlement online?			
17.11.1. Does the system recommend a value adjustment based on the criteria used for comparable grids?			

	Yes	No	Cost to Modify
17.11.2. Does the system allow users to bulk review, apply, and offer adjustments based on comp grid values?			
17.11.3. Does the system collect the taxpayers opinion of value and compare it to other value sources?			
17.11.4. Does the system allow a taxpayer to accept or reject an offer online?			
17.11.5. If so, is the taxpayer decision loaded into the system without user intervention?			
17.12. Does the system allow The District to notify the taxpayer of status or changes to the online protest?			
17.12.1. If so, is text message notification an option?			
17.13. Does the system allow non-value related settlements or withdrawals to be entered without changes to the notified values, final market values, or value-related protests or settlements?			
17.14. Does the system allow Agents to file a protest online?			
17.15. Does the system allow The District evidence to be published online for the Agent?			
17.16. Does the system allow the Agent to submit evidence online?			
17.17. If so, is the evidence loaded into the system without user intervention?			
17.17.1. Are there security parameters in place to protect The District from large or corrupt uploaded files?			
17.17.2. Does the system allow the Agent to schedule a hearing online from The District's configured available dates?			
17.17.3. Does the system allow the Agent to schedule a hearing by location?			
17.17.4. Does the system allow an Agent to reschedule a hearing online?			
17.17.5. Does the system allow an Agent to withdraw a protest online?			
17.18. Does the system allow The District to offer a settlement online to an Agent?			
17.19. Does the system allow an Agent to accept or reject an offer online?			
17.20. If so, is the Agent decision loaded in to the system without user intervention?			
17.20.1. Does the system allow The District to notify the Agent of status or changes to the online protest?			

18. Lawsuit/Arbitration Tracking	Yes	No	Cost to Modify
18.1. Does the system have a way to track lawsuits?			
18.2. Does the system display lawsuit data in a condensed format so statuses, changes, filing history, and account values can all be summarized on a single screen?			
18.2.1. Can changes be made from this screen?			
18.3. Does the system allow adding accounts in mass based on new petitions?			
18.4. Does the system have an evidence tool for lawsuits?			
18.4.1. Does this tool have similar functionality to the ARB evidence tool?			
18.4.2. Does this tool allow for importing the evidence from the ARB hearing?			
18.5. Does the system track court information?			
18.6. Does the system track lawsuit cost information?			
18.7. Does the system have a way to track jurisdictional flaws?			
18.8. Does the system have a way to track protest reason/type?			
18.9. Does the system have a way to track plaintiff name?			
18.10. Does the system have a way to track the cause number?			
18.11. Does the system have a way to track date filed, date served, final delivered date, amended date, and original answer filed date?			
18.12. Does the system track the defendant's attorney and the plaintiff's attorney?			
18.13. Does the system track notice value and ARB value?			
18.14. Does the system track the tax status and date paid?			
18.15. Does the system track the agreed value and approved agreed judgement dates?			

18.16. Does the system track the disposition status, conformed date, and closed date?			
18.17. Does the system track the category granted for current and prior year?			
18.18. Does the system track the total litigated value for current and prior year?			
18.19. Does the system track the final value and net difference for current and prior year?			
18.20. Does the system have a tax entity notified field?			
18.21. Does the system have a problem/comments field?			
18.22. Does the system track letters for flagged/closed accounts?			
18.23. Does the system generate letter to the entities for flagged accounts?			
18.24. Does the system store the beginning value and the ending value for the lawsuit?			
18.25. Does the system show the value lost by entity?			
18.26. Does the system allow images to be attached to the lawsuit?			
18.27. Does the system have letter processing for lawsuits?			
18.28. Does the system automatically generate letters based on specific events?			
18.29. Does the system have a way to track arbitration cases?			
18.30. Does the system have a way to track arbitration case numbers?			
18.31. Does the system have a way to track the individual's (owner and/or agent) name that filed the arbitration case and their contact information?			
18.32. Does the system have a way to track the arbitration value request?			
18.33. Does the system have a way to track the arbitration fee that was paid?			
18.34. Does the system have a way to track comptroller arbitration acceptance, denial, and withdraw letters and dates?			
18.35. Does the system have a way to track and calculate an arbitration 45-day settlement window deadline from the date of the comptroller's acceptance letter?			
18.36. Does the system have a way to track tax status with date paid?			
18.37. Does the system have a way to track assigned arbitration and arbitrator information (name, mailing address, phone number, e-mail address)?			
18.38. Does the system have a way to track arbitration evidence deadlines, hearing dates, times, and hearing type (teleconference or in person, and informals in person then the location)?			
18.39. Does the system have a way to generate arbitration evidence cover letters using account and arbitrator information?			
18.40. Does the system track the arbitrator contact information?			
18.41. Does the system allow for different owner contact info to be used for the arbitration vs all other communications?			
18.42. Does the system show arbitration information?			
18.43. Can a user search for arbitration records by property type?			
18.43.1. Property Designation?			
18.43.2. Property Use?			
18.44. Does the system track value changes?			
18.45. Does the system have letter processing for arbitration?			
18.46. Does the system have an evidence tool for arbitrations?			
18.46.1. Does the system allow for configuration of a standard evidence packet for arbitration, to meet USPAP appraisal report guidelines?			
18.46.2. Does this tool have similar functionality to the ARB evidence tool			
18.46.3. Does this tool allow for importing the evidence from the ARB hearing?			
18.47. Does the system allow images for lawsuit and arbitration?			

19.Inquiry Tracking	Yes	No	Cost to Modify
19.1. Does the system have a way to track general inquiries from property owners or inquiries?			
19.2. Are the inquiries stored by year in chronological order?			
19.3. Can these inquiries be scheduled by appraiser?			
19.4. Can these inquiries have the status changed in mass?			
19.5. Does the system store the beginning value and the ending value for the inquiry?			
19.6. Does the system allow creating protests through a wizard?			
19.7. Does the system use an automated letter processing system to print personalized form letters to the property owner or agent?			
19.8. Does the system automatically save an image of any letter mailed to property owner or agent?			
19.9. Does the system support letter processing "templates" that allow for the routing of letters and forms to specific printers in the office?			
19.10. Does the system track events related to a particular inquiry?			
19.11. Does the system allow for any windows object be attached to an inquiry event? Windows objects such as video clips, audio recordings, etc.?			
19.12. Does the system track a change log associated with the inquiry tracking system?			
19.13. Does the system allow for document images to be scanned or attached into an inquiry record?			
19.14. Is the system able to automatically generate a sales comp grid with automatic adjustments and weighted to the subjects characteristics?			
19.15. Is the system able to automatically generate an equity comp grid with automatic adjustments and weighted to the subjects characteristics?			
19.16. Does the system allow for a search for inquiry records?			
19.17. Can this search be customized by date, appraiser, status, sign-in time etc..?			
19.18. Does this search allow configuration to automatically refresh at a pre-defined interval for monitoring purposes?			
19.19. Does the system allow search by inquiry reason?			
19.20. Does the system have any reports associated with the inquiry tracking system?			
19.21. Does the system import or link notes and images from the inquiry into the protest?			
20.Configurable Active Reports	Yes	No	Cost to Modify
20.1. Does the application have a way to configure a generic query, stored procedure or view and display the results in a columnar window within the application?			
20.1.1. Can these be scheduled to run at a future time?			
20.2. Does this allow for user assignment configuration?			
20.3. Does this allow for reports on arbitrations?			
20.4. Does this allow for reports on Lawsuits?			
20.5. Does this allow for reports on properties valued with Marshall & Swift?			
20.6. Does this allow for automatic time-interval refresh configuration?			
20.7. Does this allow for mass update of accounts?			

21.Letter and Forms Processing	YES	NO	Cost to Modify
21.1. Does the system have an integrated method of producing mail-merge type letters to property owners, agents, entities, mortgage companies and attorneys?			
21.2. Does this letter processing system utilize an industry-standard word processor such as Microsoft Word?			
21.3. Can the mail-merge function be called from within the appraisal application?			
21.4. Does the letter processing system display all available fields that can be used for mail-merge features?			
21.5. Does the letter processing system allow the property main image to be included in the mail-merge function?			
21.6. Does the letter processing system automatically save an image of the document that is printed or mailed to the property owner, agent, entity, mortgage company, or attorney?			
21.7. Does the letter processing system allow for custom fields to be entered during creation of each letter? (flex-fields)			
21.8. Does the system have an integrated forms processing system that will automatically identify the document being scanned using a barcode and assign it to the bar-coded account?			
21.9. Does this forms processing system identify the business personal property rendition form?			
21.9.1. If so, does the process allow the rendition data to be entered when scanned?			
21.9.2. Is there an option to capture the rendition image and complete data entry later?			
21.10. Does this forms processing system identify the homestead exemption application form?			
21.11. Does this forms processing system identify the Notice of Protest form?			
21.12. Does the forms processing system identify images as Protest Evidence or Letters?			
21.13. Does the system assign template IDs to all forms and letters?			
21.14. Does the system assign and track for versioning of letter and form templates?			
21.15. Does the system preserve the formatting of previously used templates?			
21.16. Can the system track, maintain, and automatically archive letters or forms in accordance with specific state and/or TAD record retention and record disposition rules?			
21.17. Does the system allow for the creation of PDF fillable forms?			
21.18. Does the system allow for forms to be digitally signed by the user and/or property owner?			
21.19. Can the system generate certified mail numbers?			
21.20. Can the system generate mail tracking numbers for standard mail?			
21.21. Can the system be configured to automatically generate and mail a specific letter or form based on changes made by a user?			
21.22. Does the system allow for a one-to-many relationship between the letter and the exemptions?			
21.23. Does the system allow for a one-to-many relationship between the letter and the affected tax years?			
21.24. Does the system allow the user to select from a list of canned responses?			
21.25. Does the system allow the user to override the mailing address of record for one-off mailings?			
21.26. Can letters or forms be generated in mass without exporting data to an external spreadsheet or text file?			

22. Mass Maintenance and Quick Entry System	Yes	No	Cost to Modify
22.1. Does the system have a separate entry system for fast data entry of information as processed by data entry operators without the use of the mouse?			
22.2. Does this data entry system allow for function keys to be assigned to repetitive functions?			
22.3. Does the system allow for function key assignment to vary per user?			
22.4. Does the system have a separate mass maintenance system for data entry of information in mass using queries or pre-defined parameters such as subdivision code, geo number ranges, etc?			
22.5. Can a change done in mass be rolled back (undone) for the group of properties affected?			
22.6. Does the system have the means to mass update entities?			
22.7. Can notes be added in mass?			
22.8. Can assessment statuses be added or updated in mass to prevent reporting to the roll or inclusion on a notice data pull?			
22.9. Can the fields that are available for mass updated be limited by user rights or groups?			
22.10. Does the system have the means to mass update agent information?			
22.11. Does the system support industry standard hot keys and shortcuts			

23. Account Image Module	Yes	No	Cost to Modify
23.1. Does the system have an integrated Imaging system?			
23.2. Does the system support jpg saving common files to accounts?			
23.3. Does the system support tif saving common files to accounts?			
23.4. Does the system support pdf saving common files to accounts?			
23.5. Does the system support msg saving common files to accounts?			
23.6. Does the system support saving common Microsoft office file types to accounts?			
23.7. Does the system allow a primary image to be selected for the account?			
23.8. Does the system allow the primary image to be year specific?			
23.9. Does the system allow for document annotation including notes, highlights, shapes, arrows, etc.?			
23.10. Does the system allow for redaction of sensitive or protected information?			
23.10.1. If so, is the redaction automated?			
23.10.2. If so, are the redactions retained when printing, downloading, or exporting the document?			
23.11. Does the system allow for a new image to initiate a workflow process for associated accounts?			
23.12. Does the system have a hierarchy to organize images?			
23.12.1. Does the hierarchy support organization by tax year?			
23.12.2. Does the hierarchy support organization by appraisal method?			
23.12.3. Does the hierarchy support organization by confidentiality?			
23.13. Does the system have encryption for confidential document types?			

VIII. MASS APPRAISAL CAPABILITIES

24.Real Property Valuation	Yes	No	Cost to Modify
24.1. Does the application maintain totally separate appraisal information including related schedules and valuation data by tax year?			
24.2. Are user-defined schedules used to value?			
24.2.1. If so, are all schedules completely user-maintainable?			
24.2.2. Are the schedules maintained by year?			
24.3. Are improvement features user-definable? (i.e. interior, exterior, fireplace, etc)			
24.3.1. If so, is the number of user-definable features unlimited?			
24.4. Are the user-definable features used to effect value?			
24.5. Does the application allow valuation using GIM's and EGIM's?			
24.6. Does the application allow for a loaded cap rate?			
24.7. Does the application allow allocation of value to different models for mixed use properties?			
24.8. Does the application apply income or sales models in mass by property type or classification?			
24.9. Does the application perform regression analysis?			
24.10. Does the system allow for overrides of modeled values?			
24.11. Does the system value land by models and tables?			
24.12. Can the land value method be copied to all accounts in an economic unit?			
24.13. Can portions of land be coded and valued as excess or surplus land?			
24.14. Does the system have a reappraisal work flow with statistics by property type and staff member?			
24.15. Can the system generate ratio studies and reports at any time?			
24.16. Does the application allow the following units of measurements to be used to value:			
24.16.1. Square footage?			
24.16.2. Acreage?			
24.16.3. Front footage?			
24.16.4. Lot depth?			
24.16.5. Length / width?			
24.16.6. Wall Height?			
24.16.7. Area Perimeter?			
24.16.8. Percentage of main area value?			
24.16.9. Percentage of main area dollars per square foot?			
24.16.10. User-Definable Features?			
24.16.11. Flat Value Pricing?			
24.16.12. Percentage of entity?			
24.16.13. Percent Finish-out?			
24.16.14. Per leasable unit?			
24.17. Does the sketch tool allow drawing by angle and distance?			
24.18. Does the sketch tool flip and rotate sketches?			
24.19. Can the sketch tool import and scale building plans so they can be drawn over the top of?			
24.20. Does the sketch tool allow for overlay on GIS and aerial imagery?			
24.21. Does the sketch tool allow for a segment of a polygon to be and arc or curve?			
24.22. Does the application allow for an unlimited number of land and improvement adjustments?			
24.22.1.1. If so, are the adjustments code-driven?			
24.22.2. Can the adjustments be identified as percentage or value adjustments?			

24.22.3. Can a description be saved describing each adjustment?			
24.23. Does the application allow mass value modifications by all of the following means:			
24.23.1. Neighborhood?			
24.23.2. Property type?			
24.23.3. Subdivision?			
24.23.4. Cost Multiplier?			
24.23.5. Local Multiplier?			
24.23.6. If so, will changing the value of any of the above mass modifiers flag the associated properties automatically for mass recalculation without user intervention?			
24.24. Does the system support properties where portions are homestead, non homestead, and agricultural special appraisal on a single account?			
24.25. Does the system allow specific items to be exempt at the detail/feature level, such as solar panels on homes? (This should not be a subtraction of their value at the end but a removal from the taxable value to prevent distortion of HS caps)			
24.26. Does the system support the Income Approach to valuation?			
24.26.1. If so, can a user capture and query actual data in the system?			
24.26.2. Can the user build and track a settlement offer using all valuation methods including DCF, Schedule, Pro Forma and actual rent data?			
24.26.3. Can the user store a Base Cap rate and account for taxes with the rate using multiple options?			
24.26.4. Can the user save multiple income models and select the most fitting model for the current years valuation?			
24.27. Does the system support Marshall & Swift for commercial properties?			
24.28. Does the system support a process to review remodeled properties and adjust condition characteristics for valuation?			

25. Personal Property Valuation	Yes	No	Cost to Modify
25.1. Does the system allow BPP accounts to be linked to the real property account?			
25.2. Can the real property account be found from the BPP account?			
25.3. Does the real property account display a list of BPP accounts at that location?			
25.4. Does the system allow for multiple personal property segments (i.e. inventory, furniture & fixtures, etc.) on a personal property account?			
25.5. Does the system allow for unlimited valuation methods using state-defined schedules?			
25.6. Does the system allow for user-defined local schedules?			
25.7. Does the system allow for unlimited years of rendered information?			
25.8. Does the system allow for the value to be assigned based on a selection of multiple values?			
25.8.1. For instance: unlimited state-defined or user-defined schedules, prior year value, rendered value, etc.?			
25.9. Does the system allow the user to define codes?			
25.10. Does the system allow for the application of depreciation schedules?			
25.11. Does the system allow for the application of cost index schedules?			
25.12. Does the system allow the user to define quality and density on a personal property segment?			
25.13. Does the system allow the user to define the value of a segment that is considered special inventory?			
25.14. Does the system allow tracking monthly sales dollars of special inventory property?			
25.15. Does the system allow tracking monthly sales volume of special inventory property?			

25.16. Does the system allow tracking detail vehicle information of special inventory property?			
25.17. Does the system report dealers who have not filed their information by user-specified date?			
25.18. Will the system be able create mass reports from the entry levels above by entity, field area or business type?			
25.19. Does the system allow for BPP parcels to be updated and/or created remotely with a cellular connection directly into CAMA system?			
25.20. Does the system allow for new BPP parcels to be created remotely without a cellular connection via external application (excel template)?			
25.21. Does the system allow quick access to BPP images and documents by tax year at the account level?			
25.22. Does the system allow the ability to read and populate rendered data from PDF (TAD rendition or state form) to the CAMA system?			
25.23. Does the system allow for BPP account to be saved in whole (without saving after each entry) before going to another page or session in the CAMA system?			
25.24. Does the system have the ability for more than one person to access an account simultaneously?			
25.25. Does the system have prompt response time between screens and updating of data fields?			
25.26. Will the system be able to recognize entity codes by the situs address automatically and catch errors on entity codes not matching situs?			
25.27. Does the system allow for staff to create BPP account using customized format to resemble aircraft tail number, mineral lease number, Var-X DBA name or dealer license?			
25.28. Does the system allow appraisal calculation according to tax code section 21.03, 21.05 and section 21.09 (interstate allocation)?			
25.29. Does the system allow appraisal calculation according to tax code section 11.251 (freeport exemption)?			
25.30. Does the system allow appraisal calculation according to tax code section 11.31 (pollution control exemption)?			
25.31. Does the system allow for the addition of late penalties according to tax code section 11 and section 21 (late filings)?			
25.32. Does the system allow the acknowledgment of September 1 appraisal designation?			
25.33. Does the system allow appraisal calculation according to tax code section 11.36 (medical/biomedical exemption)?			
25.34. Does the system allow appraisal value exception according to tax code section 11.145 (value less than $2,500)?			
25.35. Does the system allow appraisal calculation according to tax code section 11.252 (personal use leased vehicle exemption)?			
25.36. Does the system allow appraisal calculation according to tax code section 11.254 (mixed-use vehicle exemption)?			
25.37. Does the system allow appraisal calculation via cost and application of depreciation schedules per asset on various location assets?			
25.38. Does the system report dealers who had fewer than five units sold in a given year?			
25.39. Does the system provide an asset management system for easy update of assets?			
25.40. Does the system support the concept of "sub-segments" where multiple assets of the same type can be grouped together and value is rolled up to the segment level?			
25.41. Does the system allow for a rolled up value to be overridden by the user?			
25.42. Does the system allow for renditions to be submitted on line?			
25.43. Does the online rendition allow for pre populating with the prior years assets?			

26.Sales Analysis	Yes	No	Cost to Modify
26.1. Does the application provide for the retention of sales history?			
26.1.1. Does the application provide for the retention of 30 sales records per property?			
26.2. Are these instruments displayed in chronological order?			
26.3. Does the application provide for a way to add sales that are outside of the county?			
26.4. Does the system allow instruments recorded without affecting the official chain of title?			
26.5. Does the system allow for confidentiality of the sale separate from the property owner?			
26.6. Does the application allow for multiple sales to be recorded on one account?			
26.7. Does the application allow for multiple properties within one sale record?			
26.7.1. If so, does it combine the market values of properties before comparing to sale price?			
26.8. Does the application allow for land-only and improvement-only indicators on sale records?			
26.8.1. If so, does it only use the value indicated when comparing to sale price?			
26.9. Does system allow the land size indicated in the sale be maintained separately from the recorded land size?			
26.10. Does the system allow land sales to be tracked and used as comps even after splits and new construction has occurred on the original property?			
26.11. Does the system allow multiple separate deed transactions to used to generate a sale entry for a multi property/multi owner transaction? (such as an estate sale)			
26.12. Does the system link and track mineral interests with real property sales?			
26.13. Does the system have a module for BPP sales tracking?			
26.14. Does the system link and track BPP that is part of a sale?			
26.15. Is sales financing information stored with sale records?			
26.16. Can the system record multiple confirmations?			
26.17. Can the sale be flagged as confidential?			
26.18. Can comparable sales be extracted using user-definable criteria?			
26.19. Can comparable sales analysis use characteristics as of the time of sale versus current property characteristics?			
26.20. Are histograms and scatter diagrams available on the sales history?			
26.21. Are all of the following statistics reported on comparable sales in the application:			
26.21.1. Mean?			
26.21.2. Median?			
26.21.3. Variance?			
26.21.4. Standard Deviation			
26.21.5. Coefficient of Dispersion?			
26.21.6. Sales ratio of the property?			

27.Building Permits	Yes	No	Cost to Modify
27.1. Does the system support building permits?			
27.2. Does the system allow for a building permit to initiate a workflow process for associated accounts?			
27.3. Does the system allow viewing of building permits by GIS?			
27.4. Can permits be located by Permit Number?			
27.5. Can permits be located by Permit Type?			
27.6. Can permits be located by Appraiser Assigned?			
27.7. Can permits be located by Property Owner?			
27.8. Can permits be located by Property ID?			
27.9. Can permits be located by Situs?			
27.10. Can a report be printed of building permits?			
27.11. Can a report be printed for specified building permits?			
27.12. Can permits be coded active or inactive?			
27.13. Can permits be coded with multiple properties?			
27.14. Do permits have a date worked?			
27.15. Do permits have a date completed?			
27.16. Do permits have percent complete?			
27.17. Can permits be imported from other types of files?			

28.Rollbacks	Yes	No	Cost to Modify
28.1. Does the system provide a quick, easy, user-friendly process for adding AG rollbacks?			
28.2. Does the system do all calculations automatically for all types of AG rollbacks?			
28.3. Does the system allow multiple rollbacks on a property at a time?			
28.4. Does the system allow multiple properties to be processed as a single rollback?			
28.5. Does the system allow for multiple owners to be part of a rollback group?			
28.6. Does the system allow for an account to have an absolute exemption in lieu of a rollback?			
28.7. Does the system allow for automatically generating letters for a rollback?			
28.8. Does the system import rollback data, letters, and worksheets into ARB when rollbacks are protested?			
28.9. Does the system provide a calculation worksheet to be given to the taxpayer?			

29.Comparable Sales & Comparable Property	Yes	No	Cost to Modify
29.1. Does the system allow for comparable sales to be searched for? If so, do the criteria include the following.			
29.1.1. Can comparable sales be located by a distance radius?			
29.1.2. Can comparable sales be located by Region Code?			
29.1.3. Can comparable sales be located by Abstract or Subdivision Code?			
29.1.4. Can comparable sales be located by Neighborhood Code?			
29.1.5. Can comparable sales be located by Subset Code?			
29.1.6. Can comparable sales be located by Map ID?			
29.1.7. Can comparable sales be located by School Code?			
29.1.8. Can comparable sales be located by City Code?			
29.1.9. Can comparable sales be located by situs?			
29.1.10. Can comparable sales be located by Improvement Class?			
29.1.11. Can comparable sales be located by Living Area?			
29.1.12. Can comparable sales be located by Improvement Year Built?			
29.1.13. Can comparable sales be located by Improvement Unit Price?			

29.1.14. Can comparable sales be located by Improvement Additive Value?			
29.1.15. Can comparable sales be located by Land Type?			
29.1.16. Can comparable sales be located by Land Area?			
29.1.17. Can comparable sales be located by Land Area Type?			
29.1.18. Can comparable sales be located by Land Unit Price?			
29.1.19. Can comparable sales be located by Sale Type?			
29.1.20. Can comparable sales be located by Sale Date?			
29.1.21. Can comparable sales be located by Sale Price?			
29.1.22. Can comparable sales be located by grantor and grantee?			
29.1.23. Can comparable sales be located by transaction type?			
29.1.24. Can comparable sales be located by any combination of the above?			
29.2. Can comparable sales be 'weighted' by each factor above?			
29.3. Can a comparable sales grid be printed include picture images of the comps?			
29.4. Can a report listing be printed of the selected comps?			
29.5. Can appraisal cards be printed of the selected comps?			
29.6. Can comparable PROPERTY be located by same criteria above even if the property has not sold? In other words, can you find LIKE PROPERTY when searching?			
29.7. Can comparable sales and comparable property be located by Tax Appraisal year?			
29.8. Can comparable criteria be saved for later retrieval by other users?			
29.9. Does the system allow for residential comparable sales and equity grids?			
29.10. Does the system allow for commercial comparable sales and equity grids?			
29.11. Does the system allow for Income comparable grids?			

30. Residential Comparable Sales Grid with Automatic Adjustments	Yes	No	Cost to Modify
30.1. Does the system automatically generate a comparable sales grid weighted to the characteristics of the subject?			
30.2. Does the system allow comparison of property characteristics at the time of sale versus current property characteristics?			
30.3. Does the system automatically adjust each individual comp sale component in relation to the subject property?			
30.4. Does the system adjust for Land Market Difference between the subject and comp?			
30.5. Does the system adjust for Effective Year Built differences between the subject and comp?			
30.6. Does the system adjust for Living Area Difference between the subject and comp?			
30.7. Does the system adjust for each improvement detail segment difference?			
30.8. Does the system adjust for Plumbing differences between subject and comp?			
30.9. Does the system adjust for Fireplace differences between subject and comp?			
30.10. Does the system adjust for Number of Bedrooms between subject and comp?			
30.11. Does the system show the Indicated Value for the subject based on the comps listed?			
30.12. Does the system show the Mean & Median for the subject indicated value?			
30.13. Does the system show the Digital Picture associated with subject and each comp?			
30.14. Does the system allow for this comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings) ?			
30.15. Does the system automatically allow for the viewing of such comp grid geographically using GIS coverages?			

31.Residential Equity Comp Grid with Automatic Adjustments	Yes	No	Cost to Modify
31.1. Does the system automatically generate an equitable property grid weighted to the characteristics of the subject?			
31.2. Does the system automatically adjust each individual equity component in relation to the subject property?			
31.3. Does the system adjust for Land Market Difference between the subject and equity comp?			
31.4. Does the system adjust for Effective Year Built Difference between the subject and equity comp?			
31.5. Does the system adjust for Living Area Difference between the subject and equity comp?			
31.6. Does the system adjust for each improvement detail segment difference?			
31.7. Does the system adjust for Plumbing differences between subject and equity comp?			
31.8. Does the system adjust for Fireplace differences between subject and equity comp?			
31.9. Does the system adjust for Number of Bedrooms between subject and equity comp?			
31.10. Does the system show the Indicated Value for the subject based on the equity comps listed?			
31.11. Does the system show the Mean & Median for the subject indicated value?			
31.12. Does the system show the Digital Picture associated with subject and each equity comp?			
31.13. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings)?			
31.14. Does the system automatically allow for the viewing of such equity comp grid geographically using GIS coverages?			

32.Commercial Comp Sales Grid with Automatic Adjustments	Yes	No	Cost to Modify
32.1. Does the system automatically generate a comparable sales grid weighted to the characteristics of the subject?			
32.2. Does the system allow generation of a comp grid for properties valued on income?			
32.3. Does the system allow comparison of property characteristics at the time of sale versus current property characteristics?			
32.4. Does the system automatically adjust each individual comp sale component in relation to the subject property?			
32.5. Does the system adjust for Land Market Difference between the subject and comp?			
32.6. Does the system adjust for Effective Year Built differences between the subject and comp?			
32.7. Does the system adjust for Living Area Difference between the subject and comp?			
32.8. Does the system adjust for each improvement detail segment difference?			
32.9. Does the system adjust for Plumbing differences between subject and comp?			
32.10. Does the system adjust for Fireplace differences between subject and comp?			
32.11. Does the system adjust for Number of Bedrooms between subject and comp?			
32.12. Does the system show the Indicated Value for the subject based on the comps listed?			
32.13. Does the system show the Mean & Median for the subject indicated value?			
32.14. Does the system show the Digital Picture associated with subject and each comp?			
32.15. Does the system allow for this comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings) ?			
32.16. Does the system automatically allow for the viewing of such comp grid geographically using GIS coverages?			

33.Commercial Equity Comp Grid with Automatic Adjustments	Yes	No	Cost to Modify
33.1. Does the system automatically generate an equitable property grid weighted to the characteristics of the subject?			
33.2. Does the system automatically adjust each individual equity component in relation to the subject property?			
33.3. Does the system allow generation of a comp grid for properties valued on income?			
33.4. Does the system adjust for Land Market Difference between the subject and equity comp?			
33.5. Does the system adjust for Effective Year Built Difference between the subject and equity comp?			
33.6. Does the system adjust for Living Area Difference between the subject and equity comp?			
33.7. Does the system adjust for each improvement detail segment difference?			
33.8. Does the system adjust for Plumbing differences between subject and equity comp?			
33.9. Does the system adjust for Fireplace differences between subject and equity comp?			
33.10. Does the system adjust for Number of Bedrooms between subject and equity comp?			
33.11. Does the system show the Indicated Value for the subject based on the equity comps listed?			
33.12. Does the system show the Mean & Median for the subject indicated value?			
33.13. Does the system show the Digital Picture associated with subject and each equity comp?			
33.14. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e. ARB Meetings)?			
33.15. Does the system automatically allow for the viewing of such equity comp grid geographically using GIS coverages?			

34.Profiling	Yes	No	Cost to Modify
34.1. Does the system allow for profiling of Appraisal and sales information based on appraisal vs sale ratios?			
34.2. Does the system allow profiling with characteristics at the time of sale versus current property characteristics?			
34.3. By Neighborhood?			
34.4. By Abstract/Subdivision Code?			
34.5. By Region?			
34.6. By Subset?			
34.7. By Query?			
34.8. Does the profile report provide the following statistical functions:			
34.8.1. Lows and highs?			
34.8.2. Mean?			
34.8.3. Median?			
34.8.4. Averages?			
34.8.5. Coefficient of Dispersion?			
34.8.6. Coefficient of Variance?			
34.8.7. Gross Rent Multipliers?			
34.8.8. Gross Income Multipliers?			
34.8.9. Class Breakdown?			
34.8.10. Plot sales ratios on a graph?			
34.9. Does the system provide Neighborhood Calibration?			
34.10. Provide statistics by overall, improved, and vacant?			

	Yes	No	Cost to Modify
34.11. Does the profiling process for one neighborhood take less than 1 minute to complete?			
34.12. Does the application allow you to 'link' profiles?			

35. GIS Connectivity

	Yes	No	Cost to Modify
35.1. Does the system support an integrated live connection to a GIS System?			
35.2. Does the system support an integrated live connection to ESRI online?			
35.3. Does the system allow for GIS to be viewed from within application?			
35.4. Can year specific data be displayed in the GIS front-end?			
35.4.1. Does year specific data pull from the system?			
35.5. Does the system allow a default map template to be created for users? (All users view the map configuration upon accessing GIS.)			
35.5.1. Can a user save a specific map configuration for his responsibilities, where the default map view for the system is not obstructed? (The user can create and modify the data and layers in the map view accessed from his login.)			
35.5.2. Is map configuration limited by user rights?			
35.6. Does user have control over GIS files to be viewed?			
35.7. Can user have panoramic capabilities in GIS?			
35.8. Does the GIS tool utilize shortcut keys for zoom?			
35.9. Does the GIS tool utilize shortcut keys for pan?			
35.10. Does the GIS tool utilize shortcut keys for select/unselect?			
35.11. Does the GIS front-end allow multiple tools for zooming within the map?			
35.11.1. Zoom tool?			
35.11.2. Mouse scroll?			
35.11.3. Mouse click?			
35.12. Can a user print map?			
35.12.1. If so, can user configure map format and add text for print output?			
35.13. Can GIS display attribute data on map?			
35.14. Is attribute data viewed controlled by user rights?			
35.15. Can user control the display of labels for attribute within the GIS front-end?			
35.16. Can user access different properties from GIS?			
35.17. Can user search for properties within GIS? If so by:			
35.17.1. Property ID?			
35.17.2. State Code			
35.17.3. Subdivision			
35.17.4. Neighborhood			
35.17.5. Entities			
35.17.6. Situs Address			
35.17.7. Owner			
35.17.8. Land size			
35.17.9. Improvement class			
35.17.10. Improvement year built			
35.17.11. Sale date			
35.17.12. Price/sq ft			
35.17.13. Sale type			
35.17.14. Building permit number			
35.17.15. Permit date			
35.17.16. Permit status			
35.17.17. Appraiser			
35.17.18. Inspection date			
35.17.19. Effective acres grouping			
35.18. Does GIS locate property and zoom to the property in GIS map view?			

35.19. Can application integrate with multiple data sources?

    35.19.1. Shapefiles?

    35.19.2. Rasters?

    35.19.3. Map packages?

    35.19.4. SDE?

    35.19.5. Geodatabase

    35.19.6. ESRI published basemaps?

35.20. Can aerial imagery be viewed from GIS?

35.21. Can a user print a preliminary appraisal roll for properties selected in the GIS?

35.22. Can a user print an appraisal card for properties selected from the GIS front-end?

35.23. Can a user add a text note to a property within the GIS front-end?

35.24. Can user view linked properties and details of each property from the GIS front-end?

35.25. Can user 'bookmark' specific properties to return to within the GIS front-end?

35.26. Does system provide a quick, easy, user-friendly process to add GIS files?

35.27. Does the system allow for mass update of CAMA data using a GIS front-end?

35.28. Can GIS be used in connection with Pictometry?

35.29. Can GIS be used in connection with Google maps?

35.30. Can GIS be used in connection with Bing maps?

35.31. Can GIS be used in connection with Cyclomedia?

35.32. Can user select and de-select properties for processing from GIS front-end?

35.33. Can user apply Symbology to layers within GIS front-end?

35.34. Can user apply spatial analysis in GIS front-end?

    35.34.1. Buffer

    35.34.2. Clip

    35.34.3. Intersect

    35.34.4. Union

    35.34.5. If so, can user update properties from GIS front-end selected by spatial analysis tools within GIS front-end?

35.35. Can user select properties by radius or buffer from GIS?

35.36. Can user view linked properties, including BPP, and details of each property from the GIS front-end?

36. Portable Field Devices	Yes	No	Cost to Modify
36.1. Does the system allow electronic field devices to be used for fieldwork?			
36.2. Are the proposed portable field devices Lightweight? Approx Weight:			
36.3. Does the system provide a user-friendly interface for fieldwork?			
36.4. Is that interface designed specifically for mobile touch devices?			
36.5. Does the system provide a way to configure, customize and define the user interface on the tablet device for use in the field? This configuration should be available and not require additional programming by the vendor.			
36.6. Is the field device required to have an open internet connection in order to function?			
36.7. Will the field device work in both an online and offline mode?			
36.8. Does the field device automatically provide an optimal route for visiting the parcels?			
36.9. Can the appraiser view the property information on one screen in an electronic field card view?			
36.10. Does the field solution allow for data validation during entry by the appraiser? This is to help aid the appraiser's data entry and only allow valid values to be entered into the system.			

36.11. Does the field solution have the ability to directly update the CAMA database so that no additional data entry is required after the field inspection has been completed?

36.12. Does the field solution allow for an administrative and quality control application where the data collected in the field can be validated prior to being saved within the main CAMA system?

36.13. If data is found to need correction, can a supervisor or other authorized user either correct the data and/or push it back to the appraiser while in the field to make additional modifications?

36.14. Can a supervisor or other authorized user mass update properties to be pushed into the CAMA system?

36.15. Can the office staff and the field appraisers use the field device to communicate back and forth with each other electronically within the solution?

36.16. Is the property account available for data entry in office while the account is being worked in the field by the appraiser? Field solution should not lock the parcel in the office.

36.17. Are GIS map(s) available in the field device?

36.18. Does the field device allow the user to sketch the property while in the field without using a separate application?

36.19. Can the field appraiser start sketching one building or part of a building and then start another without having to finish the first building sketch? Can the appraiser walk the building once rather than multiple times to pick up each detail of the building in order to fully complete the property sketch?

36.20. Does the field sketch application integrate with Bluetooth electronic laser measuring devices (like Disto)?

36.21. Does that integration allow the field appraiser the ability to take measurements on and electronic measuring device (like Disto) and have those measurements automatically transferred to the device?

36.22. Can the field appraiser use those transferred measurements to sketch the property without having to manually enter the measurements or draw?

36.23. Does the GIS map show the field appraiser which properties need to be worked?

36.24. Does the GIS map show the field appraiser the properties which have been worked?

36.25. Does the GIS map allow the field appraiser to open properties which were not already part of the work group directly from the field?

36.26. Does the GIS map allow properties to be highlighted that match advanced search criteria?

36.27. Does the field device have an integrated camera?

36.28. Does the field device allow for multiple pictures to be taken for a single property?

36.29. Does the field device allow multiple pictures to be added to the account with a single click per picture?

36.30. Can the appraiser use the GIS map(s) to view and select the properties they wish to work on the field device?

36.31. Can the appraiser view a color gradient thematic map showing certain CAMA data trends within GIS? For example: the ability to graphically show a neighborhood's effective age or class breakdown.

36.32. Can a street layer be used so that the appraiser has street names when in an offline mode?

36.33. If I have Pictometry Connect, can the field device utilize that information (without opening a separate application) so that I can view my Pictometry data in the field?

36.34. Does the field device allow a user to work BPP Account?

36.35. Can the user attach a picture to a BPP account?

36.36. Can the user create a new account?

36.37. Can the user delete an account?			
37. Internet Capabilities	Yes	No	Cost to Modify
37.1. Does the system allow for live publishing of Appraisal Information on the Internet?			
37.2. Does the system allow support tickets to be entered and monitored on the Internet?			
37.3. Does the system allow Taxpayers to file a HS Exemption Application online?			
37.4. Does the system allow an Agent to fille non HS applications online?			
37.5. Does the system allow a Taxpayer to verify their ownership and update their mailing address and other contact information online?			
37.6. Does the application support automated chat or other AI customer assistance features?			
37.7. Does the system suppress confidential information from the general public while making it accessible to the authorized owner or agent via their specific online account?			
37.8. Does the system allow an Agent to file a HS Exemption Application online?			
37.9. Does the system allow an Agent to fille non HS applications online?			
37.10. Does the system allow an Agent to manage fiduciary responsibilities online, including filing Appointment of Agent and removing FID authority?			
37.11. Does the system allow an owner to manage their agent online?			
37.12. Does the system allow filing a BPP rendition online?			
37.13. Does the system automatically import online application data into the correct fields in the database?			
37.14. Does the system allow the user to configure custom online applications and import the data into the correct fields in the database?			
37.15. Does the system allow the user to survey rental rates and vacancy online and populate the results into appropriate fields of a table in the database for analysis?			
37.16. Does the system allow the user to generate custom surveys and map the results into appropriate fields and tables in the database?			
37.17. Does the system allow TAD appraisers to access and update data online?			
37.18. Does the system include an ARB database as required by state law?			

IX. PERFORMANCE <u>GUIDELINES</u>

38.Mass Processing	Yes	No	Cost to Modify
38.1. Does the application perform a full system recalculate with the benchmark property quantities in 4 hours or less?			
38.2. Has the application been tested with a full system recalculate with the benchmark property quantities in 4 hours or less?			
38.3. Does the application generate 200,000 residential sales comparable grids in 2 hours or less ?			
38.4. Has the system been tested generating 200,000 residential sales comparable grids in 2 hours or less?			
38.5. Does the application generate 200,000 residential equity comparable grids in 2 hours or less ?			
38.6. Has the system been tested generating 200,000 residential equity grids in 2 hours or less?			
38.7. Does the application generate and print entity totals for all entities in 1 hour or less?			

APPENDIX

General Texas Appraisal Cycle Calender

January	
1	- Date that taxable values (except for inventories appraised Sept. 1) and qualification for certain exemptions are determined for the tax year (Secs. 11.42(a), 23.01(a), 23.12(f)). - Date a tax lien attaches to property to secure payments of taxes, penalties and interest that will be imposed for the year (Sec. 32.01(a)). - Date that members of appraisal district boards of directors begin two-year terms in even-numbered years in counties with a population less than 75,000 (Secs. 6.03(b)). - Date that appointed members of appraisal district boards of directors begin four-year staggered terms every other even-numbered year, with elected members beginning four-year staggered terms every other odd-numbered year in counties with a population 75,000 or more (Sec. 6.0301(e)). - Date that half of appraisal review board (ARB) members begin two-year terms and that ARB commissioners begin one year terms (Sec. 6.41(d-8)). - Date by which ARB commissioners, if appointed in the county, are required to return a list of proposed ARB members to the local administrative district judge (Sec. 6.41(d-7)). - Deadline for chief appraisers to notify the Comptroller's office of eligibility to serve as chief appraisers (Sec. 6.05(c)). - Date the temporary exemption for qualified property damaged by disaster expires as a qualified property of the first tax year in which the property is reappraised under Sec. 25.18 (Sec 11.35(k)).
2	Date rendition period begins (Sec. 22.23(a)).
10	If a tax bill from the previous year is mailed after this date, the delinquency date is postponed (Sec. 31.04(a)).
31	- Deadline for the Comptroller's office to publish the preliminary *School District Property Value Study (SDPVS)* findings, certify findings to the Texas commissioner of education, and deliver findings to each school district (Gov't Code Sec. 403.302(g)). ○ **NOTE:** A qualified school district or property owner may protest preliminary findings by filing a petition with the Comptroller not later than the 40th day after the date (whether Jan. 31 or an earlier date) on which the Comptroller's findings are certified to the Texas commissioner of education (Gov't Code Sec.403.303(a)). - Last day for chief appraiser to deliver applications for agricultural designation and exemptions requiring annual applications (Secs. 11.44(a)), 23.43(e)). - Last day for disabled or age 65 or older homeowners or disabled veterans and their surviving spouses qualified for Sec. 11.22 exemptions to provide notice of intent to pay by installment and pay the first installment of homestead property taxes if the delinquency date is Feb. 1. Other delinquency dates have different installment notice and payment deadlines. This deadline also applies to partially disabled veterans and their surviving spouses with homesteads donated from charitable organizations (Sec. 31.031(a-1)). - Last day for homeowners or qualified businesses whose properties were damaged in a disaster within a designated disaster area to pay the first installment for taxes with Feb. 1 delinquency dates if using installment payment option. Other delinquency dates have different notice and payment deadlines (Sec. 31.032(b)). - Last day for an appraisal district to give public notice of the capitalization rate to be used in that year to appraise property with low- and moderate-income housing exemption (Sec. 11.1825(r)).

February	
1	• Last day for motor vehicle, vessel and outboard motors, heavy equipment and manufactured housing dealers to file dealer's inventory declarations (Secs. 23.121(f), 23.124(f), 23.1241(f), 23.127(f)). • Date that taxes imposed the previous year become delinquent if a bill was mailed on or before Jan. 10 of the current year (Secs. 31.02(a), 31.04(a)). • Rollback tax and interest for change of use of 1-d, 1-d-1, timber, and restricted-use timber land become delinquent if taxing unit delivered a bill to the owner at least 20 days before this date (Secs. 23.46(c), 23.55(e), 23.76(e), 23.9807(f)).
15	• Last day for tax collector to disburse motor vehicle, vessel and outboard motor, heavy equipment and manufactured housing inventory taxes from escrow accounts to taxing units (Secs. 23.122(k), 23.1242(j), 23.125(k), 23.128(j)).
28 **(29 if a leap year)**	• Last day to request separate appraisal for interest in a cooperative housing corporation (Sec. 23.19(c)).
March	
31	• Last day for taxing units' second quarterly payment for the current year appraisal district budget (Sec. 6.06(e)). • Last day for disabled or age 65 or older homeowners or disabled veterans and their surviving spouses qualified for Sec. 11.22 exemptions to pay second installment on taxes with Feb. 1 delinquency dates. Other delinquency dates have different installment payment deadlines. This deadline also applies to partially disabled veterans and their surviving spouses with homesteads donated from charitable organizations (Sec. 31.031(a) and (a-1)). • Last day for homeowners or qualified businesses whose properties were damaged in a disaster area to pay second installment on taxes with Feb. 1 delinquency dates. Other delinquency dates have different installment payment deadlines (Sec. 31.032(a) and (b)). • Last day for qualified community housing development organizations to file listing of property acquired or sold during the past year with the chief appraiser (Sec. 11.182(i)).
April	
1	• Last day for qualifying local governments to submit completed applications to the Comptroller's office to receive disabled veteran assistance payments for previous fiscal year (Local Gov't Code Sec. 140.011(e)). • Last day (or as soon as practicable thereafter) for chief appraiser to mail notices of appraised value for single-family residence homestead properties (Sec. 25.19(a)). • Last day (or as soon thereafter as practicable) for chief appraiser to deliver a clear and understandable written notice to property owner of a single-family residence that qualifies for an exemption under Sec. 11.13 if an exemption or partial exemption that was approved for the preceding year was canceled or reduced for the current year (Sec. 25.193(a)). • Last day for the chief appraiser to notify the taxing units of the form in which the appraisal roll will be provided to them (Sec. 26.01(a)).
15	• Last day to file renditions and property reports on most property types. Chief appraiser must extend deadline to May 15 upon written request (Sec. 22.23(a) and (b)). ○ **NOTE:** The Comptroller and each chief appraiser are required to publicize the legal requirements for filing rendition statements and the availability of the forms in a manner reasonably designed to notify all property owners of the law (Sec. 22.21). Chief appraisers

		need to check with their legal counsel to determine the manner and timing of this notice to meet the legal requirement.
30		• Last day for property owners to file these applications or reports with the appraisal district: ○ Some exemption applications (Sec. 11.43(d))*; ○ Notice to chief appraiser that property is no longer entitled to an exemption not requiring annual application (Sec. 11.43(g)); ○ Certain applications for special appraisal or notices to chief appraiser that property no longer qualifies for 1-d agricultural land, 1-d-1 agricultural land, timberland, restricted-use timberland, recreational-park-scenic land and public access airport property (Secs. 23.43(b), 23.54(d) and (h), 23.75(d) and (h), 23.84(b) and (d), 23.94(b) and (d), 23.9804(e) and (i)); ○ Railroad rolling stock reports (Sec. 24.32(e)); ○ Requests for separate listing of separately owned land and improvements (Sec. 25.08(c)); ○ Requests for proportionate taxing of a planned unit development association property (Sec. 25.09(b)); ○ Requests for separate listing of separately owned standing timber and land (Sec. 25.10(c)); ○ Requests for separate listing of undivided interests (Sec. 25.11(b)); and ○ Requests for joint taxation of separately owned mineral interests (Sec. 25.12(b)). • Last day for chief appraiser to certify estimate of the taxable value for counties, municipalities and school districts (counties and municipalities can choose to waive the estimate) (Sec. 26.01(e) and (f)). A school district with a fiscal year beginning July 1 may use this certified estimate when preparing the notices of public meetings to adopt the budget and discuss the proposed tax rate (Educ. Code Sec. 44.004(g)-(j)). • Last day to file rendition statements and property reports for property regulated by the Texas Public Utility Commission, Texas Railroad Commission, federal Surface Transportation Board or the Federal Energy Regulatory Commission. Chief appraiser must extend deadline to May 15 upon written request (Sec. 22.23(d)). • Last day for property owners to file applications for allocation under Secs. 21.03, 21.031, 21.05 or 21.055. For good cause, chief appraiser shall extend deadline up to 30 days. Other deadlines apply if the property was not on the appraisal roll in the previous year (Sec. 21.09(b)).
		• *Exemption applications for cemeteries, certain charitable organizations, religious organizations, private schools, nonprofit water supply or wastewater service corporations and other nonprofit organizations must be filed within one year of acquiring the property (Secs. 11.42(d) and 11.43(d)). Homestead exemption applications, other than Sec. 11.13(c) or (d), for property acquired after January 1 may receive an exemption authorized by Section 11.13 for the applicable portion of that tax year immediately on qualification for the exemption if the preceding owner did not receive the same exemption for that tax year (Sec, 11.42(f)).
May		
1		• Last day (or as soon as practicable thereafter) for chief appraiser to mail notices of appraised value for properties other than single-family residence homesteads (Sec. 25.19(a)). • Last day (or as soon thereafter as practicable) for chief appraiser to deliver a clear and understandable written notice to the property owner of residence homestead property that does not qualify for an exemption under Sec. 11.13 if an exemption or partial exemption that was approved for the preceding year was canceled or reduced for the current year (Sec. 25.193(a)).
1-14		• Period to file resolutions with chief appraiser to change appraisal district's finance method (Sec. 6.061(c)).

1-15	• Period when chief appraiser must publish notice about taxpayer protest procedures in a local newspaper with general circulation (Sec. 41.70(a) and (b)). ○ **NOTE**: Chief appraisers must annually publicize property owner rights and methods to protest to the ARB (Sec. 41.41(b)). Chief appraisers should consult legal counsel on the manner and timing to fulfill this requirement.
2	• Beginning of time period when taxing units must notify delinquent taxpayers that taxes delinquent on July 1 will incur additional penalty for attorney collection costs at least 30 days and not more than 60 days before July 1. Period ends on June 1 (Sec. 33.07(d)).
15	• Deadline for ARBs to adopt ARB hearing procedures; adopted hearing procedures must be submitted to PTAD within 15 days of adoption (Sec. 41.01(c) and (d)). • Last day to file renditions and property reports for most property types if an extension was requested in writing. Chief appraiser may extend deadline an additional 15 days for good cause (Sec. 22.23(b)). • Date (or as soon as practicable thereafter) for chief appraiser to prepare appraisal records and submit to ARB (Secs. 25.01(a), 25.22(a)). • Last day to file most protests with ARB (or by 30th day after notice of appraised value is delivered, whichever is later) (Sec. 41.44(a)(1)).
19	• Last day for chief appraiser to determine whether a sufficient number of eligible taxing units filed resolutions to change appraisal district's finance method (Sec. 6.061(d)).
24	• Last day for chief appraiser to notify taxing units of change in the appraisal district's finance method (Sec. 6.061(d)).
31	• Last day for taxing units to file challenges with ARB (or within 15 days after the date the appraisal records are submitted to ARB (whichever is later) (Sec. 41.04). • Last day for disabled or age 65 or older homeowners or disabled veterans and their surviving spouses qualified for Sec. 11.22 exemptions to pay third installment on taxes with Feb. 1 delinquency dates. Other delinquency dates have different installment payment deadlines. This deadline also applies to partially disabled veterans and their surviving spouses with homesteads donated from charitable organizations (Sec. 31.031(a) and (a-1)). • Last day for homeowners and qualified businesses whose properties were damaged in a disaster area to pay third installment on taxes with Feb. 1 delinquency dates. Other delinquency dates have different installment payment deadlines (Sec. 31.032(a) and (b)). • Last day for a religious organization that has been denied a Sec. 11.20 exemption because of its charter to amend the charter and file a new application (or before the 60th day after the date of notification of the exemption denial, whichever is later) (Sec. 11.421(b)). • Last day for taxing unit to take official action to extend the date by which aircraft parts must be transported outside the state after acquired or imported to up to 730 days for the aircraft parts to be exempt from taxation as freeport goods for the current and subsequent tax years (Sec. 11.251(l)).
June	
14	• Last day for chief appraiser to submit proposed budget for next year to appraisal district board and taxing units (unless taxing units have changed appraisal district's fiscal year) (Sec. 6.06(a) and (i)).
15	• Last day (or the 60th day after the date on which the chief appraiser delivers notice to the property owner under Sec 22.22, if applicable) for chief appraisers to accept and approve or deny late-filed freeport exemption applications (Sec. 11.4391(a)).
16	• Beginning date that appraisal district board may pass resolution to change appraisal district's finance method, subject to taxing units' unanimous approval. Period ends before Aug. 15 (Sec. 6.061(a)).

30	• Last day to pay second half of split payment for taxes imposed last year (Sec. 31.03(a)). • Last day for taxing units' third quarterly payment for the appraisal district budget for the current year (Sec. 6.06(e)). • Last day to form a taxing unit to levy property taxes for the current year (Sec. 26.12(d)). • Last day for taxing units to adopt local option percentage homestead exemptions (Sec. 11.13(n)). • Last day for a private school that has been denied an 11.21 exemption because of the charter to amend the charter and file a new application (or the 60th day after the date of notification of the exemption denial, whichever is later) (Sec. 11.422(a)(1)).
July	
1	• Date that delinquent taxes incur total 12 percent penalty (Sec. 33.01(a)). • A taxing unit or appraisal district may provide that taxes that become delinquent on or after Feb. 1 of a year but not later than May 1 of that year and that remain delinquent on July 1 of the year in which they become delinquent incur an additional penalty to defray costs of collection, if the unit or appraisal district or another unit that collects taxes for the unit has contracted with an attorney to enforce the collection of delinquent taxes (Sec. 33.07(a)). ○ **NOTE:** Taxing units and appraisal districts that have imposed the additional penalty for collection costs under Sec. 33.07 may provide for an additional penalty for attorney collection costs of taxes that become delinquent on or after June 1 under Secs. 26.07(f), 26.15(e), 31.03, 31.031, 31.032, 31.04, or 42.42. The penalty is incurred on the first day of the first month that begins at least 21 days after the date the collector sends the property owner a notice of delinquency and penalty (Sec 33.08(a) and (c)). • Last day for review and protests of appraisals of railroad rolling stock values (or as soon as practicable thereafter); once the appraised value is approved, the chief appraiser certifies to the Comptroller's office the allocated market value (Secs. 24.35(b), 24.36).
20	• Date ARB must approve appraisal records, but may not do so if more than 5 percent of total appraised value remains under protest. The board of directors of an appraisal district in a county with a population of 1 million or more may postpone the deadline to Aug. 30 or increase the threshold percentage from 5 to 10 percent of the appraised value of properties not under protest (Sec. 41.12(a)-(c)).
25	• Last day for Comptroller's office to certify apportionment of railroad rolling stock value to counties, with supplemental records after that date (Secs. 24.38, 24.40). • Last day for chief appraiser to certify appraisal roll to each taxing unit (Sec. 26.01(a)). • Last day for chief appraiser to prepare and certify to the assessor for each taxing unit an estimate of the taxable property value if the ARB has not approved the appraisal records by July 20 (Sec. 26.01(a-1)).
31	• Last day for disabled or age 65 or older homeowners or disabled veterans and their surviving spouses qualified for Sec. 11.22 exemptions to pay fourth installment on taxes with Feb. 1 delinquency dates. Other delinquency dates have different installment payment deadlines. This deadline also applies to partially disabled veterans and their surviving spouses with homesteads donated from charitable organizations (Sec. 31.031(a-1)). • Last day for homeowners and qualified businesses whose properties were damaged in a disaster area to pay fourth installment on taxes with Feb. 1 delinquency dates. Other delinquency dates have different installment payment deadlines (Sec. 31.032(b)). • Last day for property owners to apply for Sept. 1 inventory appraisal for the next year (Sec. 23.12(f)).

August	
1	• Date taxing unit's assessor submits appraisal roll and date that collector submits collection rate estimate for the current year to the governing body (or soon after as practical) (Sec. 26.04(b)).
7	• Date taxing units (other than school districts, small taxing units and water districts) must publicize no-new-revenue and voter-approval tax rates, unencumbered fund balances, debt obligation schedule and other applicable items (or as soon as practical thereafter) (Secs. 26.04(e) and (e)(1), 26.052(b) and Water Code Secs. 49.107(g), 49.108(f)). • Date chief appraisers must post a notice on the appraisal district's Internet website to property owners in the appraisal district stating the estimated amount of property taxes may be found in the property tax database required by Tax Code Section 26.17 (or as soon thereafter as practicable) (Sec. 26.04(e-2)). • Date chief appraisers must publish the notice required by Tax Code Section 26.04(e-2) in a newspaper of general circulation in the county for which the appraisal district is established (Sec. 26.04(e-6)).
14	• Last day for appraisal district board to pass resolution to change appraisal district's finance method, subject to taxing unit's unanimous consent (Sec. 6.061(a)). • Last day for appraisal district board to pass resolution to change number of directors, method for appointing, or both, and deliver the resolution to each taxing unit (Sec. 6.031(a)).
15	• Deadline for Comptroller's office to certify final SDPVS findings to commissioner of education except as provided (Comptroller Rule Sec. 9.4317(d)).
30	• Date ARB must approve appraisal records for appraisal districts in counties with populations of 1 million or more where the board of directors has postponed the deadline from July 20 (Sec. 41.12(c)(1)).
31	• If a tax bill is returned undelivered to a taxing unit by the United States Postal Service, a taxing unit must waive penalties and interest if the taxing unit does not send another tax bill at least 21 days before the delinquency date to the current mailing address furnished by the property owner and the property owner establishes that a current mailing address was furnished to the appraisal district for the tax bill before Sept. 1 of the year in which the tax is assessed (Sec. 33.011(b)(1)). • Last day taxing units may file resolutions with the appraisal district board to oppose proposed change in the appraisal district finance method (Sec. 6.061(a)). • Last day for taxing unit entitled to vote for appointment of appraisal district boards of directors to file a resolution opposing a change by the appraisal district board in the number and selection of directors (Sec. 6.031(a)). • Deadline to file form with chief appraiser and collector to elect not to be treated as a motor vehicle inventory dealer for the next tax year, if eligible (Sec. 23.121(a)(3)(D)(iii)).
September	
1	• Date that taxable value of inventories may be determined at property owner's written option (Sec. 23.12(f)).
14	• Last day for appraisal district board to adopt appraisal district budget for the next year, unless a district has changed its fiscal year (Sec. 6.06(b) and (i)). • Last day for appraisal district board to notify taxing units in writing if a proposal to change a finance method by taxing units' unanimous consent has been rejected (Sec. 6.061(a)). • Last day for appraisal district board to notify taxing units in writing if a proposal to change the number or method of selecting appraisal district boards of directors is rejected by a voting taxing unit (Sec. 6.031(a)).

29	•	Last day for taxing units to adopt tax rate for the current year, or before the 60th day after the date the certified appraisal roll is received by a taxing unit, whichever is later. Failure to adopt by these required dates results in a unit adopting the lower of its no-new-revenue tax rate for this year or last year's tax rate; unit's governing body must ratify new rate within five days of establishing rate (Sec. 26.05(a) and(c)).
30	•	Last day for taxing units' fourth quarterly payment for appraisal district budget for the current year (Sec. 6.06(e)).
October		
1	•	Date tax assessor mails tax bills for the year (or soon after as practical) (Sec. 31.01(a)).
November		
30	•	First half of split payment of taxes is due on or before this date (Sec 31.03(a)).
December		
1-31	•	Time when appraisal office may conduct a mail survey to verify homestead exemption eligibility (Sec. 11.47(a)).
31	•	Last day for taxing units' first quarterly payment for appraisal district budget for next year (Sec. 6.06(e)).
	•	Last day for taxing units to take official action to tax goods-in-transit for the following tax year (Sec. 11.253(j)).