REQUEST FOR PROPOSALS
RFP#01-4140p

“State of the Art” automated Computer Assisted Mass Appraisal (CAMA) solution along with tax office suite of software (TSS, Including tax assessment, tax collections and land record software.

ISSUE DATE: FEBRUARY 12, 2020

ISSUING DEPARTMENT:
MACON COUNTY FINANCE DEPARTMENT
5 WEST MAIN STREET
FRANKLIN, NC 28734
PHONE: (828) 524–1640
FAX: (828) 349–2520
ATTN: LINDSAY LEOPARD, PURCHASING AGENT
lleopard@maconnc.org

PROPOSALS WILL BE RECEIVED UNTIL MARCH 31, 2020

PROPOSALS ARE TO BE SEALED AND MAILED TO THE ABOVE ADDRESS OR DELIVERED TO THE PURCHASING AGENT’S OFFICE LOCATED IN THE MACON COUNTY ANNEX BUILDING AT 5 WEST MAIN STREET, FRANKLIN, NC 28734
MACON COUNTY, NORTH CAROLINA

FINANCE DEPARTMENT

Request No. 01-4140p

February 12, 2020

Request for Proposals for CAMA solution along with tax office suite of software for Macon County Tax Office

Proposals are subject to the conditions and specifications herein, are invited for furnishing the following services. Proposals will be received by the Macon County Finance Department until 4:00 p.m. local time on Tuesday, March 31, 2020. Proposals submitted in response to this Request for Proposals shall not be subject to public inspection until a contract is awarded.

MAILING INSTRUCTIONS

1. Proposer shall submit a complete, fully executed proposal with attachments as required herein.

2. If mailed, proposal should be forwarded by certified U.S. Postal Service. Please address and mark your proposal as shown below.

MACON COUNTY FINANCE DEPARTMENT
ATTN: LINDSAY LEOPARD
5 WEST MAIN STREET
FRANKLIN, NC 28734
RFP NO. 01-4140p

3. If forwarded other than by U.S. Postal Service, delivery must be made directly to Macon County Finance Department, 5 West Main Street, Franklin, NC 28734.

4. All proposers shall seal the envelopes containing proposals and mark upon the outside the following: TAX OFFICE SOFTWARE MACON COUNTY-TO BE OPENED March 31, 2020 @ 4:00 p.m. The name and address of the proposer must be plainly marked on the outside of the envelope.

NOTE: IF MAIL OR DELIVERY BY ANY OTHER MEANS IS DELAYED BEYOND THE DATE AND HOUR SET FOR PROPOSAL OPENING, PROPOSAL THUS DELAYED WILL NOT BE CONSIDERED.
1. Introduction:

This Request for Proposal (RFP) is for the purpose of contracting with a single qualified software company to provide Macon County with a “State of the Art” automated Computer Assisted Mass Appraisal (CAMA) solution along with tax office suite of software (TSS, including tax assessment, tax collections and land record software. The goal of this RFP is to contract with a qualified software company that can provide a proven solution to streamline operations and system performance in the Tax Assessor’s Office.

The County of Macon is a unit of local government in the State of North Carolina with a current population of approximately 36,500. The County is comprised of a total of 44,500 parcels, which can be broken down into 90% residential, 5% commercial and 5% agricultural improved parcels. Macon County Tax Office also lists, appraises and assesses over 800 businesses.

There are a total of 17 employees in the Tax Administration Office.

2. Objectives:

Macon County plans to identify the proposal, through this RFP, which is the best overall proposed as determined by Macon County. Macon County’s requirements, has a clear and logical implementation and development plan, is strongly supported, and can be implemented within a 18-month time period from beginning of project start. Any other time frame will have to be negotiated with the County prior to the acceptance of proposal.

The proposer must show stability and financial strength so Macon County will be assured a long-term relationship with the proposer of software.

This request for proposal (RFP) is intended to provide software companies with a common, uniform set of instructions to assist them in the development of their proposals and to provide a uniform method for the County to fairly evaluate proposals and subsequently select a proposal that provides a fully integrated Tax Billing, Tax Collections, Land Records and CAMA software system. The main purpose of a fully integrated Tax Billing, Tax Collections, Land Records and CAMA software system is to update technology and find more efficient ways to automate processes while easily moving data across platforms.

The County desires an integrated suite of software that is comprised of one system with standard database architecture. This will allow the efficient flow of data from our current Land Records and CAMA system to the Tax Billing and Tax Collections system into ESRI and MUNIS financials.

The proposer must have a proven track record of meeting its customer’s requirements and implementation deadlines.
3. Proposal Submittal Information:

A. Submission Due Date: Proposals shall be received no later than 4:00 p.m. eastern standard time, on Tuesday, March 31, 2020.

B. Proposal Address: Proposals must be sealed, and mailed or hand delivered to:
   Macon County Finance Department
   Attn: Lindsay Leopard
   5 W Main Street
   Franklin, NC 28734

C. Proposal Inquiries / Questions: Any questions regarding this RFP shall be emailed to Lindsay Leopard, lleopard@maconnc.org. Companies shall list RFP 01-4140p in the subject line of the email. No questions will be answered by phone. Inquiries and questions should be submitted before Friday, February 28, 2020, at 5:00 p.m.

D. Method of Submitting Proposals: One (1) original and two (2) copies of the proposal must be submitted in a sealed package(s) clearly marked: TAX OFFICE SOFTWARE MACON COUNTY- TO BE OPENED March 31, 2020, @ 4:00 p.m.

E. Additional Proposal Submission Information: An individual authorized to contractually bind the proposer shall sign the Authorized Signature Form. No proposals will be accepted after the above due date. Failure to follow all preparation instructions may cause return of the proposal unevaluated. All expenses for the preparation of proposals are the responsibility of the company. All proposals must be submitted in writing to the proposal address listed above. No facsimile, e-mail or telephone offers will be accepted. The software company shall include any documents necessary to support their proposal in the RFP response. Vendors shall be responsible for the actual delivery of proposals to the address and by the due date indicated above.

4. Schedule of Events:

February 12, 2020       RFP Issued
February 28, 2020       Inquiries / Questions Due by 5:00 p.m.
March 13, 2020          County responses / answers to questions posted to website by 5:00 p.m.
March 31, 2020          RFP Close, due by 4:00 p.m.

5. Factors To Be Considered In Awarding Contract Under This RFP:

A. Proposal Information:

1. General Information: Proposals should be submitted by qualified firms with an established North Carolina client base, an intimate knowledge of North Carolina General Statutes and over five years of experience in providing CAMA & TSS to local governments.
In responding to this RFP, proposals should follow the prescribed format and use the forms included to ensure the data is easily compared with data submitted by other proposals to fairly and objectively evaluate each proposal.

Macon County reserves the right to reject any or all proposals, to waive informalities to determine the best overall proposal based on the evaluation criteria and the best interest of Macon County. The lowest dollar proposal will not necessarily be selected by Macon County. Macon County intends to select the best overall proposal as determined by Macon County.

The proposals will be evaluated by a committee which will make a recommendation to Macon County as to which of the Proposals received is the best overall proposal received and proposal information will be kept confidential until an award is made.

2. **Warranties:** Macon County will assume that any software company submitting a proposal in response to the RFP, warrants and guarantees that the products or services designed to be supplied by the vendor are, in fact, fully capable of performing the tasks designated by the RFP. The agreement entered into between the County and the company will contain the warranty that any products supplied will be new and free from defects in design, materials and workmanship, and will be capable of the purpose for which the RFP was designed and published. No limitation or exception to this warranty provision will be acceptable to Macon County. If the products or services are not capable of performing the task designated by the RFP, the vendor will assume the liability of providing services and programming at no extra cost to deliver the product promised in the Contract signed by the Software company.

3. **Product Substitutions:** Macon County recognizes that technology may change during the term of the contract. Therefore, Macon County may accept changes to the specification for the application software. The software company should give Macon County thirty (30) days advance notice in writing of any changes to the original proposal specifications. Macon County reserves the right to accept or decline the specification changes and will indicate the decision in writing to the Company and reserves the right to terminate the contract if the proposed substitutions are not judged to meet Macon County’s requirements.

4. **Insurance:** The selected software company shall purchase and maintain in force, with an insurance company licensed to do business in the State of North Carolina, at its own expense, insurance that will protect the vendor from claims which may arise out of or result from the vendor execution of the work, whether such execution be by himself, his employees, agents, or by anyone for whose acts any of them may be liable. If any such work covered by the contract is to be performed on County owned or leased premises, the software company agrees to carry liability and workman’s compensation insurance, satisfactory to the County, and to indemnify the County against all liability, loss, and damage arising out of any injuries to persons and property caused by the vendor, his sub-contractors, employees or agents. The insurance coverage shall be such as to fully protect the County and the general public from any and all claims for injury and damage resulting by any actions on the part of the software company or its’ forces as enumerated above.
5. **Modification or Withdrawal of Proposal:** Proposal may be modified or withdrawn prior to the exact hour and date specified for receipt of Proposal, provided the modification or withdrawal is in writing and is delivered in the same manner as a Proposal was submitted.

6. **County Reservation of Rights:** This RFP does not commit Macon County to award a contract, to pay any costs incurred in the preparation of a proposal to this request, or to procure or contract for services or supplies. Macon County reserves the right to accept or reject any or all proposals received as a result of this request, to re-initiate the RFP process, to negotiate with any qualified sources, or to waive any defects or informalities in part or in its entirety.

**B. Proposal Format:**

Proposals must include the following information:

1. **Cover Letter**

2. **Company History** - A brief history of your company including stability and financial resources. Please list any pending or current litigation.

3. **Qualifications & References** - Include names and telephone numbers of contact people for whom you have performed similar work in the State of N.C. or close by if possible. Please include references that are in near proximity to Macon County if possible. Please include how many jurisdictions/municipalities are currently using your program.

4. **Software Company Proposed Project Plan** - A detailed description of your program and Macon County proposed project implementation plan. This should include a timeline of the project.

5. **Response to Requirements** - A detailed response to functionality requirements. Based on each description please complete each section. If the company does not offer that requirement at this time but is in the development stages, please state when you expect to have that completed and the additional cost of that component.

6. **Pricing** - All costs involved. Please provide first year and on-going 5 years of support and maintenance. Including annual service fees or fees for upgrades, conversion cost, etc. Please provide any licensing fees that may need to be obtained.

7. **Training & Support** – The Software company must provide on-site training services by a qualified trainer(s) for System Administrators and the Tax Billing & Collection, Land Records, and CAMA users. This should include on-site training as well as written manuals for each area of software. Please include a clearly defined training plan with your proposal, including cost, which will provide a sufficient amount of training in order for the trainees to perform the primary function of the system unassisted.
8. **Hardware Requirements** - Detailed Hardware Requirements. Please include how this will affect Macon County’s Information Technology Department and the extent their involvement will be with the implementation of the software.

9. **Non-Collusion Affidavit** – This form can be found on page 76 of this RFP.

10. **Authorized Signature Form** – This form can be found on page 77 of this RFP.

11. **Tables** – Software company must complete the PDF fillable version of the Scope of Services and Technical Requirements listed in the RFP. The pdf version can be accessed at, [http://maconnc.org/finance-purchasing.html](http://maconnc.org/finance-purchasing.html)

C. **Additional Terms and Conditions**

1. **ISSUING DEPARTMENT:**
   This RFP is issued by Macon County Finance Department, 5 West Main Street, Franklin, North Carolina 28734. All correspondence and inquiry should be made to this address.

2. **NONCONFORMING TERMS AND CONDITIONS:**
   A submitted proposal that includes terms and conditions that do not conform to the terms and conditions in this RFP document is subject to rejection as nonresponsive.

3. **EXPENSES INCURRED IN PREPARING PROPOSAL:**
   Macon County accepts no responsibility for any expense incurred by the vendor in the preparation and presentation of a bid. Such expenses shall be borne exclusively by the proposer.

4. **INDEMNIFICATION:**
   To the fullest extent allowed by the applicable law, the proposer covenants to save, defend, keep harmless, and indemnify Macon County and all of its officers, departments, agencies, agents, and employees from and against all claims, loss, damage, injury, fines, penalties, and cost (including court costs and attorney’s fees, charges, liability, and exposure, however, caused) resulting from, arising out of, or in any way connected with the proposer’s performance or nonperformance of the terms and contract. This Indemnification shall survive the termination of a contract.

5. **SEVERABILITY:**
   If any provision of a contract is held to be illegal, invalid, or unenforceable, or is found to be against public policy for any reasons, such provision shall be fully severable and a contract shall be construed and enforced as if such illegal, invalid, or unenforceable provision had never been part of the contract, and the remaining provisions of the contract shall remain in full force and effect and shall not be affected by the illegal, invalid, or unenforceable provision, or by its severance from a contract.
6. ASSIGNMENT:
   During the performance of the contract, the proposer shall not assign, transfer, convey, sublet, or otherwise dispose of any contract or any or all of its rights, title, or interest therein, without the prior written consent of Macon County.

7. ETHICS IN PUBLIC CONTRACTING:
   By submitting their proposal, all proposers certify that their proposals are made without collusion or fraud and they have not offered or received any kickbacks or inducements from any other proposer, supplier, manufacturer or subcontractor in connection with their proposal. Attached Non-Collusion Affidavit must be fully executed for proposal to be deemed responsive.

8. MINORITY AND WOMEN-OWNED BUSINESSES:
   Macon County actively solicits both minority and women-owned businesses to respond to all Requests for Proposals.

9. E-VERIFY:
   Proposer is hereby required to be in compliance with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes concerning e-verification at the time of entering the Contract and at all times during the performance of a contract. All subcontractors utilized by Proposers are likewise required to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes concerning e-verification at the time of entering into a contract and at all times during the performance of the contract. Proposer shall take necessary steps to include this provision in all contracts with its subcontractors who will perform any portion of the work covered by the contract.

10. DRUG-FREE WORKPLACE:
    During the performance of a contract, the Proposer agrees to (i) provide a drug-free workplace for the its employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the its workplace and specifying the actions that will be taken against employees for violation of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Proposer that the Proposer maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over $10,000, so that the provisions will be binding upon each subcontractor or vendor. For the purposes of this section, “drug-free workplace” means a site for the performance of work done in connection with a specific contract awarded to a contractor in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.
11. All proposals shall be made firm for no less than sixty (60) days from the date of the opening of the proposals.

D. Proposer’s Responses To The Following Scope Of Services:

<table>
<thead>
<tr>
<th>System Features and Functionality</th>
<th>Yes/No</th>
<th>Comments</th>
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<tbody>
<tr>
<td>General Requirements:</td>
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<tr>
<td>1. Must be a system that uses 2016 or current Windows version.</td>
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<td>2. The solution must integrate with the current Tax Accounting solution in place.</td>
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<td>3. The system must reside on a SQL Server Database.</td>
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<td>4. The new system must be linked to the County Offices by a live connection or nightly updates.</td>
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<td>5. Software must be the latest compliant tested release.</td>
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<td>6. The system should allow the option of real time processing or batch processing.</td>
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<td>7. The system should allow effective dating of transactions.</td>
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<td>8. The system shall be an on-line, interactive, menu driven, solution that is user-friendly and reasonably easy to learn utilizing Microsoft technology.</td>
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<td>9. Menus have drill-down capabilities for detailed inquiry.</td>
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<td>10. The County and the software company must agree on the fields provided by the system prior to contract signing. The system must be able to add data elements during installation and with minimum modifications once installation is complete. (North Carolina § 132-6.1. Electronic data-processing and computer databases as public records.)</td>
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<td>11. Multiple Years</td>
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<td>a. The system must be able to maintain several years of information per parcel record.</td>
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<td>b. Parcels should not be deleted, but the statuses should be changed to reflect that records are inactive.</td>
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<td>12</td>
<td><strong>Audit/Change Tracking Capabilities</strong></td>
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<td>The system must record user logins and logouts for transaction logging. Moreover, the system must track the identification of the person to enter or last update any information, record or data element in the system for “audit trail” purposes.</td>
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<td></td>
<td>The system shall produce an audit report listing: date, time, parcel number, user name, command, field name, original data, and changed data. This report must be able to be run based on a date range or parcel number.</td>
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<tr>
<th>13</th>
<th><strong>Security/Permissions</strong></th>
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<tbody>
<tr>
<td>a.</td>
<td>The system shall provide standard and custom-definable security levels to allow or restrict access precluding inappropriate access or changes to critical data.</td>
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<tr>
<td>b.</td>
<td>Highly customizable security model. Must be able to assign read-only or write privileges on a per field, per tab or per module basis to roles/groups.</td>
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<tr>
<td>c.</td>
<td>The system must provide file maintenance activity audit trails.</td>
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<td>d.</td>
<td>Audit trails to track data changed by user name and date of change.</td>
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<td>e.</td>
<td>Capability to reset passwords for a user by System Admin</td>
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<th>14</th>
<th><strong>Application User Interface</strong></th>
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<tr>
<td>a.</td>
<td>The System must provide a user friendly graphic user interface (GUI).</td>
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<tr>
<td>b.</td>
<td>The interface must comply with industry standard design and implementation best practices when developing for a Microsoft desktop OS.</td>
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<tr>
<td>c.</td>
<td>The system should have the ability to open up new screens into a separate window. This is convenient for those users with dual monitors that want to view two sets of data at one time.</td>
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</tbody>
</table>
d. The application must have an Internet Web browser-based interface for access to parcel information, including document images.

e. It must be designed with intuitive interfaces that lead the user systematically through each process.

f. The data entry process must be customizable to facilitate rapid data entry. Data fields for a single process should be kept on a single screen whenever possible.

g. Desired functionality will include the ability to tab between boxes, auto-populate and auto-complete features, field validation (i.e., require four-digit dates), copy and paste fields and records, clear difference between user editable and non-editable fields, and efficient menu items (i.e., checklists, multiple selection menus, radio buttons, browse and attach buttons, drop-down menus, pop-up navigation menus).

h. The current parcel should stay active as the user moves between screens or forms.

15 Users of the system must be able to easily update cost tables, depreciation factors, market adjustments, and any other user-entered variables used by the system to calculate property values.

16 Must allow for import/export data (including historical assessment data) and reports to commonly used desktop application software.

17 The system must provide a building sketch function, such as APEX Sketch that will calculate areas and perimeters and automatically store the results in predefined fields in the property record for the purposes of calculating value.

18 Must support compatibility with Enterprise ESRI GIS software.
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<th></th>
<th>Ability to associate OCR scanned documents or other electronic images/documents including property photos with the data collected by the system.</th>
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<tr>
<td>20</td>
<td>Allows internal imaging capability inherent to the system, allowing digital images and scanned documents to be attached to the parcels.</td>
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<td>21</td>
<td>The system shall have a separate sales file capable of maintaining inventories of sold properties at the time of sale with a document reference that may be different from the current valuation inventory.</td>
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<td>22</td>
<td>Enables the ability to copy record characteristics from one to another or to a group of records.</td>
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<td>23</td>
<td>Enables query functions or &quot;drill down&quot; capabilities at the field level to support reporting and analysis at the desktop.</td>
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<td>24</td>
<td>Supports notes or memos to be entered. Both public and private.</td>
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<td>25</td>
<td>The system <strong>must</strong> provide a vendor designed and County approved electronic property record card for all types of properties, with labeled sketch and assessment data.</td>
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<tr>
<td>26</td>
<td>Allow for Customer inquiry capabilities on all existing data fields, parcel and account numbers, parcel street name, property address number, owner name, etc.</td>
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<tr>
<td>27</td>
<td>The system <strong>must</strong> provide a remote field data collection solution for Tax Assessment, allowing the ability to download and upload file information for field inspections. The solution should be able to function with or without internet connectivity. System must be able to make changes to the data in the field and then update when return to the office. Future goal will be to do live updates in the field including valuation.</td>
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<td>Must also be able to accommodate user defined cost tables. The cost tables shall allow for calibration by the user and support interpolation between areas in the cost tables.</td>
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<td>28</td>
<td>Major valuation methods available with the system must include the table-driven cost approach, comparable sales analysis and income approach.</td>
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<td>29</td>
<td>The system shall have the capability of computing standard assessment statistical analysis such as mean, median, sales ratios, coefficient of dispersion, price related differential, and other tests of the level and equality of assessments. The ability to download this data into standard statistical packages or spreadsheets, such as Excel, is required.</td>
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<tr>
<td>30</td>
<td>Allow for Customer query capabilities on all existing data fields, parcel and account numbers, parcel street name, property address number, owner name, etc. with unlimited criteria.</td>
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<td>31</td>
<td>The system shall include report writing capabilities that allow the user to analyze data and obtain user-defined printouts</td>
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<td>32</td>
<td>Proposed software must currently be in use in counties in the State of North Carolina.</td>
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<td>33</td>
<td>The system must integrate with the County’s Tax Accounting Software. These include: Laserfiche, ESRI, SQL server (current supported version of Windows server), Pictometry, Simplifile, etc.</td>
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<td>34</td>
<td>Software vendor must provide updates to programs reflecting any legislative changes enacted by the state of North Carolina at no additional cost.</td>
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<td>35</td>
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<tr>
<td>CAMA Functionality</td>
<td>Yes/No</td>
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<td>--------------------------------------------------------</td>
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<tr>
<td>1 Comprehensive Sales Ratio Studies</td>
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<td>2 Must have the ability to value by different land</td>
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<td>segment types and store total acres, total value,</td>
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<td>total deferred value, market value for each land</td>
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<td>segment. Land should have neighborhood adjustment</td>
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<td>factor for Commercial and residential land separated</td>
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<td>from building adjustments</td>
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<td>3 Must have user-defined influence factors such as</td>
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<td>topography, size, soil, utility, road access, etc. and</td>
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<td>be able to apply to each land segment</td>
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<td>4 Market Analysis through Multiple Regression Analysis</td>
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<td>5 Assessment Administration</td>
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<td>6 Parcel transfer and conveyances</td>
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<td>7 Appeal Processing and Scheduling</td>
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<td>8 Manufactured Homes</td>
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<td>9 Full Imaging Capability</td>
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<td>10 PDF Creation of a computer generated notices</td>
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<td>11 Proposed software must be able to run in a multi-</td>
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<td>user, multi-tasking environment with multiple users</td>
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<td>updating the same file</td>
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<td>12 Support online mass assessment, to assess</td>
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<td>multiple properties by several group types including:</td>
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<td>Subdivision, Neighborhood, Location, Structure type/</td>
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<td>class, Property type, and User defined group.</td>
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<td>13 Support standard approaches for property valuation:</td>
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<tr>
<td>Cost approach</td>
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<td>Income approach</td>
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<td>Market analysis approach</td>
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<td>Income approach (for commercial properties only)</td>
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<td>MRA (multiple regression analysis)</td>
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<td>14 Unlimited field size to describe property dimensions.</td>
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<td>Allow appraisers to manipulate and override cost data and factors, including depreciation factors, class, class adjustment, and land values, to reflect local market conditions.</td>
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<td>---</td>
</tr>
<tr>
<td>16</td>
<td>Store and display an assessment method code, from a table, to indicate how the property was valued for all property types.</td>
</tr>
<tr>
<td>17</td>
<td>Interface with a cost system with depreciation tables. Allow cost tables to be calibrated by appraisers and support interpolation between areas in cost tables.</td>
</tr>
<tr>
<td>18</td>
<td>Provide flexibility for appraisers to specify unique or tabled features to property when standard cost approach yields unsatisfactory results.</td>
</tr>
<tr>
<td>19</td>
<td>Flag properties for review where major departures from cost table standards have occurred.</td>
</tr>
<tr>
<td>20</td>
<td>Store sales information including tracking of remarks and listing the individual who provided the information.</td>
</tr>
<tr>
<td>21</td>
<td>Support modeling functions based on the income approach &amp; market approach for assessment.</td>
</tr>
<tr>
<td>22</td>
<td>Table driven size adjustment for acreage pricing.</td>
</tr>
</tbody>
</table>

**Parcel Maintenance Program**

|   | Supports multiple street addresses assigned to one parcel (e.g. ownership of condo or apartment complex). |

**Parcel Code Tables**

|   | Store unlimited number of tabled parcel code types and maintain text description for each code. |

**Parcel Record Maintenance**

<table>
<thead>
<tr>
<th></th>
<th>Maintains parcel sale history including:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Previous owner history.</td>
</tr>
<tr>
<td>3</td>
<td>Deed of trust amount.</td>
</tr>
<tr>
<td>4</td>
<td>Instrument of sale (table driven).</td>
</tr>
<tr>
<td>5</td>
<td>Type of financing: Sale Date, Sale Amount.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>6</td>
<td>Unlimited number of transactions.</td>
</tr>
<tr>
<td>7</td>
<td>Ability to transfer structure or structures from one parcel to another including the sketch information.</td>
</tr>
<tr>
<td>8</td>
<td>Supports parcel splits or subdivisions or combinations(merges).</td>
</tr>
<tr>
<td>9</td>
<td>Support parcel parent/child history by showing where the inactive parcel went to or came from when either merged or split. It also needs to show if a parcel was created or if it became inactive and had no child.</td>
</tr>
<tr>
<td>10</td>
<td>Record and track all changes to map reference numbers.</td>
</tr>
<tr>
<td>11</td>
<td>Prompts user to edit tax exemption codes when property changes ownership.</td>
</tr>
<tr>
<td>12</td>
<td>The system must be able to access historical data including full assessment change history, board of assessment appeals dockets, sales and property characteristic information by year.</td>
</tr>
<tr>
<td>13</td>
<td>Support separate property descriptions for outbuildings and improvements.</td>
</tr>
<tr>
<td>14</td>
<td>Enable the sketching of rounded surfaces and other curved areas, reversal / rotation of a sketch, and irregularly shaped areas.</td>
</tr>
<tr>
<td>15</td>
<td>Attach scanned images of building sketches and photos/files to the parcel record.</td>
</tr>
<tr>
<td>16</td>
<td>Automatically calculate building dimensions and square footage from existing and future sketches and use this calculation to value the improvements within the system.</td>
</tr>
<tr>
<td>17</td>
<td>Record detailed physical characteristics for a building, with the ability to describe each building on a property separately.</td>
</tr>
<tr>
<td>18</td>
<td>Copy sketches from one parcel to another by providing a template for property with similar new construction.</td>
</tr>
<tr>
<td>19</td>
<td>Copy user defined parcel characteristics in batch at year-end, based upon user criteria, to new year parcel records.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>20</td>
<td>Apply adjustments (e.g., corrected assessments) to current year records, prior year records or both, after taxes have been billed.</td>
</tr>
<tr>
<td>21</td>
<td>Apply adjustments in batch mode or on-screen in real time.</td>
</tr>
<tr>
<td><strong>Reporting &amp; Querying</strong></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Provide ability to view all real property owned by an individual entity, regardless of type, by name or account number.</td>
</tr>
<tr>
<td>2</td>
<td>Produce a comparable sales query and report.</td>
</tr>
<tr>
<td>3</td>
<td>Query comparable neighborhoods and view neighborhood data on screen.</td>
</tr>
<tr>
<td>4</td>
<td>Display (e.g., on a single screen) the assessed values for land, improvements, etc. for a parcel across multiple years.</td>
</tr>
<tr>
<td>5</td>
<td>Flag difficult properties for special handling.</td>
</tr>
<tr>
<td>6</td>
<td>Produce reports that will summarize change in assessment, by property, by day, by appraiser.</td>
</tr>
<tr>
<td>7</td>
<td>Query property by any field to check for duplicate records.</td>
</tr>
<tr>
<td>8</td>
<td>Allows inquiry into account information by entering a number or a range of number: Parcel number Permanent ID/Account # Account name/number Current Owner Property Address Multiple parcel types Legal description Mailing address Street address Map &amp; Parcel</td>
</tr>
<tr>
<td>9</td>
<td>Have the ability to print to: Local Printer Network printers PDF file</td>
</tr>
<tr>
<td></td>
<td>System capability to lay out and print forms such as assessing notices, field inspection sheets, sales surveys, labels etc. on blank paper and card stock such capabilities to exist on demand and in batch format.</td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>

### Year-End Processing

<table>
<thead>
<tr>
<th></th>
<th>Freezes assessment valuations for the year once certified.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Retains assessment certifications by year for each parcel for an indefinite period.</td>
</tr>
<tr>
<td>3</td>
<td>Automatically create new year property records based upon the prior year records.</td>
</tr>
<tr>
<td>4</td>
<td>Automatically create new year reference table records based upon the prior year records.</td>
</tr>
</tbody>
</table>

### User-Interface

<table>
<thead>
<tr>
<th></th>
<th>Options to interface field data collection equipment (e.g. electronic tablet, laptop) available.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Allow users the ability to “Copy, Cut and Paste” text from this program to any other Windows based program.</td>
</tr>
<tr>
<td>3</td>
<td>Allow user to correct errors without re-input of entire transaction.</td>
</tr>
<tr>
<td>4</td>
<td>Allow user to override transaction warnings (e.g. invalid parcel number), as long as user has appropriate level of assigned security.</td>
</tr>
</tbody>
</table>
E. Proposer’s Responses To The Following Technical Requirements:

Responses to Technical Requirements must be provided in this section of the proposer’s proposal. The following response key code must be used when responding to the all of the technical requirements listed below (CAMA, Personal Property, Billing Collections, and Information Technology):

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Meets Requirements</td>
</tr>
<tr>
<td>E</td>
<td>Meets requirements in another manner</td>
</tr>
<tr>
<td>RW</td>
<td>Meets requirements with the use of a “report Writer”</td>
</tr>
<tr>
<td>F</td>
<td>Functionality available in a future release</td>
</tr>
<tr>
<td>MN</td>
<td>To be modified, at no cost, to meet requirement</td>
</tr>
<tr>
<td>MC</td>
<td>To be modified, for a fee, to meet requirement</td>
</tr>
<tr>
<td>N</td>
<td>Will not meet requirement</td>
</tr>
</tbody>
</table>

Proposers must use only one code per requirement. Any requirement that is answered in any other way will be treated as a negative, non-response. Proposers may utilize the comments column to add detail of how the solution meets each requirement, cross-referencing specific requirement numbers. Proposers should place the response code in a separate column in bold type. The proposals submitted, including requirement responses, will be attached to the software license and implementation services contract.

All responses that indicate meets requirement, configurable or customizable functionality should be included in the costs submitted in this proposal. In addition, customization costs should be broken out by specific requirement. Functionality available in future versions should not be considered during response to the requirements in this proposal.

CAMA Technical Requirements

<table>
<thead>
<tr>
<th>General Requirements</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Provide for capture of full owner's name(s), full physical address, full legal description, including lot, block, phase, map, section for subdivisions, all taxing jurisdiction codes. Allow at least 40 spaces for Name(s), and Street Address.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allow for multiple owners with each percent owned, full name of owner, and mailing address of all owners per parcel.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allow for a taxpayer table, whereby a taxpayer who owns numerous properties may have their name and mailing address in one central location; This should be the account number.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide for all taxpayer account types, Exempt, Taxable, Public Utilities, and Business. 1=Taxable, 2=Business, 9=Exempt, 8=Public Utilities.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide coding for all property types, Commercial, Industrial, Exempt, Farm, Common Open Areas, Unbuildable and Residential.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide coding for property with deferred values, Use Value (Ag.), coding for exemption/ excluded property (age, government, churches, etc.) and Historic Values.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide for all tax jurisdiction codes with one levy code, as well as, individual municipal districts, fire districts (fire tax, fire fee, and fire non-fee), townships, school districts.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to go from any screen to any other screen without re-entry of the parcel ID.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Comments are accessible from every screen, screens should have a visual flag to let user know parcel has comments.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide multi-year valuation capability, system should allow at least 10 years of data.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allow forward and backward browsing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allow next record &amp; prior record retrieval.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>System will work in conjunction with billing/collection in calculation and collection of taxes and fees.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to integrate CAMA data and <strong>existing</strong> Macon County images and documents. System has to integrate geocoding of images.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
</tbody>
</table>

### Sketching

<table>
<thead>
<tr>
<th></th>
<th>Sketching</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Provide flexible sketch package (mouse driven and key entry) for all buildings including outbuildings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Generate sketch for all classes of buildings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Edit sketch without having to re-enter all vectoring.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Handle angles in sketch and area calculations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Handle arcs in sketch and area calculations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Display partial drawing while vectoring.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Provide edit of sketch for non-closure. (will not automatically force-close unless operator gives system the command to do so).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Identify invalid area description and vector errors (direction and distance).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Ability to sketch by floor, multiple floors.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Allow multiple buildings per parcel.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Allow entry of square footage of main and auxiliary areas in lieu of drawing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Adjust scale of drawing for best fit.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Record story height for each building section.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Update database directly from sketch with computed size, perimeter and structure data.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Automatically update database when sketch is changed and saved.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Display sketch label and size for each building section inside the sketch.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Ability to assign different values to segments of a building that have different uses.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Property record card should display total sketch and all vectoring.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Fields to include: Parcel Number (numeric and alpha) Parcel Number is a 10-digit number based on a geometric center of the center of a parcel.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Land Data**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Highest and Best Use tied to user defined use code.</td>
</tr>
<tr>
<td>2</td>
<td>Use Code</td>
</tr>
<tr>
<td>3</td>
<td>Zoning</td>
</tr>
<tr>
<td>4</td>
<td>Total Acres</td>
</tr>
<tr>
<td>5</td>
<td>Road Type</td>
</tr>
<tr>
<td>6</td>
<td>Utilities</td>
</tr>
<tr>
<td>7</td>
<td>Influence Adjustments (road frontage, size, shape topo., access, etc. per each land segment).</td>
</tr>
<tr>
<td>8</td>
<td>Land Base Rate</td>
</tr>
<tr>
<td>9</td>
<td>Land valuation should use table driven values by road type and segment type size table. Adjustments per land segment with market adjustment to effect All Neighborhood factors for entire neighborhood.</td>
</tr>
<tr>
<td>10</td>
<td>Unit Type (acre, square foot)</td>
</tr>
<tr>
<td>11</td>
<td>Program adds value to first land segment if acreage priced.</td>
</tr>
<tr>
<td>12</td>
<td>Total Land Units</td>
</tr>
<tr>
<td>13</td>
<td>Total Land Value</td>
</tr>
</tbody>
</table>

**Building Data**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Highest and Best Use tied to user defined.</td>
</tr>
<tr>
<td>2</td>
<td>Improvement Type (convert County's existing tables).</td>
</tr>
<tr>
<td>3</td>
<td>Building Quality / Grade</td>
</tr>
<tr>
<td>4</td>
<td>Actual Year Built (needs to go back to 1800's)</td>
</tr>
<tr>
<td>5</td>
<td>Effective Year Built</td>
</tr>
<tr>
<td>Condition code - such as excellent, good, average, poor, very poor - which will each draw from a separate depreciation table.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
</tr>
<tr>
<td>Story Height</td>
<td></td>
</tr>
<tr>
<td>number of Stories</td>
<td></td>
</tr>
<tr>
<td>Building Style</td>
<td></td>
</tr>
<tr>
<td>Number of Rooms</td>
<td></td>
</tr>
<tr>
<td>Number of Bedrooms</td>
<td></td>
</tr>
<tr>
<td>Number of Full Baths</td>
<td></td>
</tr>
<tr>
<td>Number of Half Baths</td>
<td></td>
</tr>
<tr>
<td>Additional Bathroom Fixtures</td>
<td></td>
</tr>
<tr>
<td>Interior Wall Finish</td>
<td></td>
</tr>
<tr>
<td>Floor Covers</td>
<td></td>
</tr>
<tr>
<td>Exterior Wall Type</td>
<td></td>
</tr>
<tr>
<td>Heat Type / Fuel</td>
<td></td>
</tr>
<tr>
<td>Air Conditioning</td>
<td></td>
</tr>
<tr>
<td>Fireplace Type / Number of units</td>
<td></td>
</tr>
<tr>
<td>Shape Design Adjustment</td>
<td></td>
</tr>
<tr>
<td>Physical Depreciation</td>
<td></td>
</tr>
<tr>
<td>Functional Obsolescence</td>
<td></td>
</tr>
<tr>
<td>Economic Obsolescence</td>
<td></td>
</tr>
<tr>
<td>Market Adjustment (neighborhood table to be applied to Residential and commercial buildings separately).</td>
<td></td>
</tr>
<tr>
<td>Property Physical Address</td>
<td></td>
</tr>
<tr>
<td>Doing Business As</td>
<td></td>
</tr>
<tr>
<td>Date Appraised</td>
<td></td>
</tr>
<tr>
<td>Appraised By</td>
<td></td>
</tr>
<tr>
<td>Data Entry Date</td>
<td></td>
</tr>
<tr>
<td>Entered By</td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td></td>
</tr>
<tr>
<td>Revaluation Code</td>
<td></td>
</tr>
<tr>
<td>Neighborhood Number</td>
<td></td>
</tr>
<tr>
<td>Card Number (1 of 1, etc.)</td>
<td></td>
</tr>
<tr>
<td>Code for Residential or Commercial</td>
<td></td>
</tr>
<tr>
<td>Neighborhood Adjustment</td>
<td></td>
</tr>
<tr>
<td>Physical Area Adjustment</td>
<td></td>
</tr>
<tr>
<td>Code for Extra Feature Items</td>
<td></td>
</tr>
<tr>
<td>Length and Width of Extra Feature Items</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>41</td>
<td>Number of Units for Extra Feature Items (to be calculated by system using the length and width).</td>
</tr>
<tr>
<td>42</td>
<td>Quality factor for Extra Feature Items</td>
</tr>
<tr>
<td>43</td>
<td>Year built for Extra Feature Items</td>
</tr>
<tr>
<td>44</td>
<td>Condition for Extra Feature Items</td>
</tr>
<tr>
<td>45</td>
<td>% good (to be calculated based on age and condition unless overridden) and % complete for Extra Feature Items.</td>
</tr>
<tr>
<td>46</td>
<td>Auxiliary Area Data (porches, basements, carports, garages, attics, upper stories, etc.)</td>
</tr>
<tr>
<td>47</td>
<td>Ability to apply a special $ per square foot rate to a building or extra feature item (this rate would not necessarily be in the user defined rates table).</td>
</tr>
<tr>
<td>48</td>
<td>Ability to override depreciation to attain % good or % complete for sketch able building, and extra features.</td>
</tr>
<tr>
<td>49</td>
<td>Ability to display 3 or more sales, with deed-book reference, date, validity codes, sale amount (system should maintain infinite number).</td>
</tr>
<tr>
<td>50</td>
<td>Ability to display 3 or more permit numbers, date, type, status, cost of building (system should maintain infinite number)</td>
</tr>
<tr>
<td>51</td>
<td>Ability to transfer buildings between parcels, and between cards of same parcel</td>
</tr>
<tr>
<td>52</td>
<td>Provide one property record card to accommodate either residential buildings, extra features, and land or commercial buildings, extra features, and land.</td>
</tr>
<tr>
<td>53</td>
<td>Enter and store unlimited notes / comments on individual properties.</td>
</tr>
<tr>
<td>54</td>
<td>Flag / identify new construction (identify by a code UC, or Open, etc.)</td>
</tr>
<tr>
<td>55</td>
<td>Ability to identify property by PIN number</td>
</tr>
<tr>
<td></td>
<td>System should not allow entry of incorrect data, i.e., invalid codes or codes / values that do not exist in user defined tables.</td>
</tr>
<tr>
<td>---</td>
<td>---------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>57</td>
<td>Can merge one or more parcels to create a new parcel, designating a &quot;primary&quot; parcel for the general parcel data.</td>
</tr>
<tr>
<td>58</td>
<td>Income: Ability to value property by the income approach, to include.</td>
</tr>
<tr>
<td>59</td>
<td>Building Type</td>
</tr>
<tr>
<td>60</td>
<td>Quality of Construction</td>
</tr>
<tr>
<td>61</td>
<td>Age and Condition</td>
</tr>
<tr>
<td>62</td>
<td>Apartment / Condo style and bedroom count</td>
</tr>
<tr>
<td>63</td>
<td>Gross Leasable Area Square footage</td>
</tr>
<tr>
<td>64</td>
<td>Net Leasable Area Square Footage</td>
</tr>
<tr>
<td>65</td>
<td>Number of Units</td>
</tr>
<tr>
<td>66</td>
<td>Economic Rent per Square Foot or Unit</td>
</tr>
<tr>
<td>67</td>
<td>Vacancy and Credit Loss</td>
</tr>
<tr>
<td>68</td>
<td>Other Income</td>
</tr>
<tr>
<td>69</td>
<td>Effective Gross Income</td>
</tr>
<tr>
<td>70</td>
<td>Operating Expenses</td>
</tr>
<tr>
<td>71</td>
<td>Net Operating Income</td>
</tr>
<tr>
<td>72</td>
<td>Overall Capitalization Rate</td>
</tr>
<tr>
<td>73</td>
<td>Property Value per Income Approach</td>
</tr>
<tr>
<td>74</td>
<td>Less Deferred Maintenance</td>
</tr>
<tr>
<td>75</td>
<td>Plus Excess Land</td>
</tr>
<tr>
<td>76</td>
<td>Total Property Value</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Present Use Value (Ag.)</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ability to appraise property at its Present Use (Ag.) in accordance with N.C. General Statutes.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>System must maintain Market Value and Present Use Value (Ag.) on applicable parcels. This Present use Value must show on the property card.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>System must calculate Deferred Value amount between Use Value (Ag.) and Market Value annually.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to create abstract reports on parcels subject to Present Use Value</td>
<td></td>
</tr>
<tr>
<td>Exemptions</td>
<td>Response</td>
<td>Comments</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>1</td>
<td>System must be able to calculate value on all parcels that are Tax Exempt/Excluded per N.C. General Statutes.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ability to code parcels for Elderly/Disabled, Disabled Veteran, and Circuit Breaker Homestead Exclusion.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to apply appropriate exclusion amounts.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to generate letters and reports on all parcels with Elderly/Disabled, Disabled Veteran, and Circuit Breaker Homestead Exclusion.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ability to create abstract reports on parcels subject to Exemptions/Exclusions.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Historic Properties</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>System must be able to calculate value on all parcels that are deemed to be Historic per N.C. general statutes.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>System must calculate Deferred Value amount between Historic Value and Market Value annually.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to abstract reports on parcels subject to historic exemptions.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sales Database</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Allow unlimited capture of sales per parcel.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Provide Sales Analysis and statistical module.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Allow Sales Reporting By</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sales Date</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Vacant vs. Improved</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Commercial vs. Residential</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Land size</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Land Use</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Zoning</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Neighborhood</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Range of Parcels</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Township</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Building Type</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---------------</td>
<td>---</td>
</tr>
<tr>
<td>11</td>
<td>Actual Year Built</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Effective Year Built</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Provide Comparable Sales Report with a minimum of 3 comparable sales</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Allow interactive sales ratio analysis.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Utilize user defined comp. selection criteria to search for comparable sales in computation of market values.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Allow flagging of invalid sales for inclusion or exclusion in sales studies.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Include reference to supporting property characteristic file.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Permit on-line modeling and what-if analysis without risk of corruption to database.</td>
<td></td>
</tr>
</tbody>
</table>

### Reports / Statistical Analysis

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>Sales ratio report (appraisal value/sale price) to include standard CAMA appraisal statistics including Mean, Median, COD, Standard Deviation, Coefficient of Variation (COV), Price Related Differential (PRD), Weighted Mean.</td>
<td></td>
</tr>
<tr>
<td><strong>2</strong></td>
<td>Sales Ratio report can be run using any of the following criteria: vacant, improved, residential, commercial; valid or invalid sale, or both together.</td>
<td></td>
</tr>
<tr>
<td><strong>3</strong></td>
<td>Land Analysis Reporting using all possible data in CAMA database relative to land (including parcels which have since been improved)</td>
<td></td>
</tr>
<tr>
<td><strong>4</strong></td>
<td>Building Analysis Reporting using all possible data in CAMA database relative to buildings.</td>
<td></td>
</tr>
<tr>
<td><strong>5</strong></td>
<td>Parcel Inventory Analysis using all possible data in CAMA database.</td>
<td></td>
</tr>
<tr>
<td><strong>6</strong></td>
<td>Value Analysis Reporting using all possible data in CAMA database relative to value analysis of land, building and total.</td>
<td></td>
</tr>
<tr>
<td><strong>7</strong></td>
<td>Property Record Card printing on demand either individual parcels or</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td></td>
<td>batch printing.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Real estate abstracts on demand and by either individual parcel or batch, including blank abstracts.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Provides option to automatically list real property on abstract with real estate information as needed such as property description and acreage.</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Allows ad hoc reporting using third party products.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Produces unlisted real property report.</td>
<td></td>
</tr>
</tbody>
</table>

### Appraisal Functions

<table>
<thead>
<tr>
<th></th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Provide test environment so that we can test &quot;what if&quot; scenario.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ability to value real property by three approaches to value: Cost, Market, and Income.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to allow adjustments to value by % to land and or improvement: Individually, not in mass or to total value.</td>
<td></td>
</tr>
</tbody>
</table>

#### Ability to allow for the following values:

1. Replacement Cost New Building Value
2. Replacement Cost New Less Depreciation Building Value
3. Replacement Cost New Less Depreciation for Outbuildings / Extra Features
4. Base Land Value
5. Total Adjusted Land Value
6. Present Use Land Value
7. Total Land Value
8. Acre / Square Foot / Unit (lot), land pricing that can be implemented across specified parameters, i.e., neighborhood, parcel range, land use, zoning, etc., up to and including the entire master file simultaneously.
9. Ability to mass update land, building, extra features by parcel range, neighborhood, or subdivision.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Store value history (unlimited) with reasons for change.</td>
</tr>
<tr>
<td>11</td>
<td>Interpolation between rates in cost tables due to size factor and/or perimeter.</td>
</tr>
<tr>
<td>12</td>
<td>Store multiple records per parcel.</td>
</tr>
<tr>
<td>13</td>
<td>Value property by Income Approach using Direct Capitalization.</td>
</tr>
<tr>
<td>14</td>
<td>Develop and apply tables of market rents, cap rates, vacancy levels, expense ratios on both the jurisdictional and neighborhood level.</td>
</tr>
<tr>
<td>15</td>
<td>Track building permits, their type, and their status. Macon County uses a product by Harris Corporation named BluePrince.</td>
</tr>
<tr>
<td>16</td>
<td>On-line valuation summary ledger, giving instant access to current state of valuation base, including breakdowns by property class.</td>
</tr>
<tr>
<td>17</td>
<td>Designate property use type by floor and value each floor based on its usage (i.e., multi storied commercial buildings).</td>
</tr>
<tr>
<td>18</td>
<td>Ability to trace parcel lineage (parent, child, split, combination) on-line.</td>
</tr>
<tr>
<td>19</td>
<td>Provide that table changes automatically recalculate all associated property records under user control with error reporting.</td>
</tr>
<tr>
<td>20</td>
<td>Ability to display and print cost tables and depreciation tables as reference material at any time.</td>
</tr>
<tr>
<td>21</td>
<td>Allows user to round to the nearest 100 at the Market Value Summary for Total Improvement Value (depreciated building plus extra features) and the Total Land Value.</td>
</tr>
<tr>
<td>22</td>
<td>Allow testing for insignificant changes to not update parcel values based on user defined tolerance levels.</td>
</tr>
<tr>
<td></td>
<td>23</td>
</tr>
<tr>
<td>---</td>
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<tr>
<td></td>
<td>24</td>
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<td>25</td>
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<td>26</td>
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<td>27</td>
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<td>28</td>
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<td>29</td>
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<td></td>
<td>30</td>
</tr>
<tr>
<td></td>
<td>31</td>
</tr>
<tr>
<td></td>
<td>32</td>
</tr>
</tbody>
</table>

### Public Access

<table>
<thead>
<tr>
<th></th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vender will provide a webpage of Macon County’s Appraisal and Assessment data (including sketches and photos) accessible to the public.</td>
<td></td>
</tr>
</tbody>
</table>

### Appeals

<table>
<thead>
<tr>
<th></th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter / track appeals information online.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Generate mailings and labels for appeal notices and findings to taxpayers</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Produce reports summarizing all appeal activity.</td>
<td></td>
</tr>
</tbody>
</table>
4 Support and track details per parcel for all levels of appeal: Office Review, Field Review, Board of Equalization and Review, Property Tax Commission, and Courts of Appeal.

<table>
<thead>
<tr>
<th>Change of Value Notice</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Ability to print Change of Value Notices on demand by appraiser, date or reason code.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Produce report summarizing all Change of Value Notices.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Ability to use more than one &quot;Change of Value&quot;.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Historic</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Ability to view CAMA system as it existed at the time of each value posting - including sketch.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GIS</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Interactive map user control displays ArcGIS Online or ArcGIS Enterprise web maps.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Web map's layers include feature services that display live data the proposed system’s database.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Map layer symbology can be configured in the ArcGIS Online or ArcGIS Enterprise Map Viewer and stored in the web map definition.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Map control renders selections from query results. Also provides interactive tools selecting parcels spatially.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Clicking on a parcel produces a Pop-up which is configured in the ArcGIS Online or ArcGIS Enterprise Map Viewer and stored in the web map definition.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Interactive map displaying Comparable Sales ranked parcels.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Interactive map displaying Ratio Studies results.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Interactive map for batch editing neighborhood codes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mobile Field Units</td>
<td>Response</td>
</tr>
<tr>
<td>---</td>
<td>------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Mobile application (Windows, iOS).</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>User interface designed for touch screen. Supports touch gestures, stylus, or mouse.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Interactive map displays.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Web map layers support offline geodatabase syncing as well as mobile map packages.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Supports working hosted feature layers when internet is available.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Supports working disconnected with checked-out datasets. No loss in data collection</td>
<td></td>
</tr>
<tr>
<td></td>
<td>or editing functionality.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Edits made while disconnected can be checked back in to hosted feature layers.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>All parcel structure, attachment, and outbuilding data is loaded for editing,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>including adding new or removing existing.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Property photos are loaded to the tablet. Using the device camera, new property</td>
<td></td>
</tr>
<tr>
<td></td>
<td>photos may be taken and associated with the parcel. Ability for building or parcel</td>
<td></td>
</tr>
<tr>
<td></td>
<td>tagging for photo.</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Sketch images can be loaded to the tablet.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Multi-page property record card images can be loaded to the tablet.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>All images can be marked up using virtual ink, simulating writing on paper.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Support for onboard, USB, or Bluetooth GPS device. Shows location of tablet on the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>map.</td>
<td></td>
</tr>
</tbody>
</table>
14. All edits including image markups, and new photos are automatically pulled into production database. No dual entry is required.

**Personal Property Technical Requirements**

<table>
<thead>
<tr>
<th>General Requirements</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Each screen in taxpayer maintenance should have a heading that reflects the taxpayer account number, taxpayer name and District Code. This is a control feature to ensure that the user is working with the correct account.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Ability to assign new personal property account numbers and allowing maintenance to be completed in same step.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Taxpayer name(s) 40 characters, system will allow multiple owners per account.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Address 40 characters at least 3 lines + City/State/Zip.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Field to identify business or individual i.e. 'B' or 'I'.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Field for levy code (this code is used in place of entering each district, it is a code representing each valid combination of districts).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Lookup feature on maintained fields.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Field for township code i.e.: 01 Franklin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Field for business category code: i.e.: 1(retail), 2(wholesale), 3 (manufacturing), 4 (service), 5 (leasing/rental), 6 (farm), 7 (other) Note: Need lookup option to identify available codes above.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Field for business filing status code: 1 (corporation), 2 (proprietorship), 3 (partnership), 4 (other) Note: need lookup option to identify.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Allows accounts to be flagged active or inactive.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. 2 fields for Social security/Fed. I.D. with protection against public access.</td>
<td></td>
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<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>2 fields for Contact persons.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>2 fields for phone numbers.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>2 fields for birth dates.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>2 fields for employer name.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>2 fields for employer address.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>2 fields for employer phone numbers.</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>1-character field for audit flag i.e. 'A'</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>3-character field for auditor initials</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Field for date last audited.</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Field for date business established.</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Field for date of last filing.</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Field for date out of business.</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Fields for month and day of fiscal year end.</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Field to automatically indicate person who last maintained info. Note: not to include person who viewed only.</td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Provide a comment screen with unlimited lines to maintain comments over the life of the account. Accounts should have a visual flag to let user know there are comments.</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Field for user defined exemption codes (at least 3 characters).</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Field for 6-character SIC (standard industrial classification) code. Note: When enter SIC code the system should automatically display business type and have look up option to look SIC which should be listed in alpha order. Also need the ability to add and delete to this file.</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Large field for business activity description.</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Field for Real Estate owner parcel number.</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Field(s) for Real Estate owner's name.</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Field(s) for physical address (situs) of personal property.</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>8-character field for extension date.</td>
<td></td>
</tr>
<tr>
<td>Asset Maintenance</td>
<td>Response</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>1</td>
<td>Each screen should reflect Tax Year, Taxpayer account number, Taxpayer name and District Code.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>System should flag late listed accounts, by use of dates or codes.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to maintain 11 years personal property listing records and view history in the same format as current year.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>User defined exemption code can be applied at the asset level (not whole account).</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ability to data entry: several types of assets: (1) Depreciable’s, (2) Non-Depreciable’s and (3) Others such as airplanes, boats and motors, private vehicles, etc. Data entry fields should correspond to the abstract formats from both the individual and business forms. The reduction of keystrokes and the ease at which data is entered from the listing abstracts should be an important feature in order to reduce man-hours as much as possible. The detail of the data entry of these assets are as follows: see below:</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Field to display depreciable asset group code descriptions as follows and to add additional group codes as deemed necessary:</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>ME machinery &amp; equipment</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>FF furniture &amp; fixtures</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>CE computer equipment</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>EI expensed items</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>LH leasehold improvements</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>OT other</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to enter depreciable asset data (additions, deletions, changes) from the abstract into a format which includes fields for displaying years of acquisition, (note: prior year asset cost by years of acquisition should be prelisted and displayed in an original cost field on the data entry screen), field for additions by year of acquisition, field for deletions by year of acquisition. The data entry format should also include fields for calculating totals for control purposes. (Note: this data entry field should resemble the format for depreciable assets on the business abstract listing form)</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Ability to change depreciation/trending schedule code to current year assets being entered for a specific account.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Field for Depreciation Factors displayed by year (up to 25 years) for each group code (ME, FF, CE, EI, LH, OT)</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Field for prelisted cost for each Year of Acquisition for 25 years for depreciable group codes. Acquisition costs prior to 25 years should be rolled into &quot;PRIOR: field.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Ability to enter depreciation/trending tables as provided by the North Carolina Department of Revenue.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Ability to over-ride depreciated values (i.e. pollution control equipment exempted and over-ride value as zero)</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Fields to display non-depreciable asset group code descriptions as follows: CIP construction in progress SUP supplies</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Fields to display costs for non-depreciable (CIP and SUP).</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Listing date should be displayed on personal property asset screen. Listing date should default to today’s date and can be overwritten.</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Late listing flag should be displayed on personal property asset screen, if applicable.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-----------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>For asset type OT (Other), BM (Boat &amp; Motor), AI (Airplane), MH (Mobile home), PV (Personal vehicle) need the following info: description, purchase year, purchase price, tax year, account # (account name should be displayed when acct. # entered)</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Other 'OT' need lines for the following: description, purchase year, purchase price, tax year, account # (account name should be displayed when acct. # entered.)</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Boat and Motor 'BM' need lines for the following: tax year, registration # of watercraft (6characters), taxpayer acct # (account name should be displayed when acct # entered), appraised value, purchase price, purchase year, boat description (including make and model, year), length, motor description (including make, model, year), horsepower, tax district code.</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Airplanes 'AI' need lines for the following: tax year, account # (acct name should be displayed when acct. # entered), airplane serial # (12 characters), appraised value, purchase price, purchase year, make, model, airplane year, tax district code.</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Personal Vehicle 'PV' need lines for the following: tax year, VIN, taxpayer acct. # (account name should be displayed when acct. # entered), appraised value, make, model, year of make, body, condition, tag number, title number, tax district code.</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Mobile Home 'MH' need lines for the following: tax year, acct. # (acct. name should be displayed when acct. # entered), VIN, appraised value, purchase price, purchase year, manufacturer, MH Year, width, length, MH Park number, lot number, title number, title number, tax district code.</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Interface with motor vehicle program to compare VIN listed on personal property and VIN listed in motor vehicle program and flag matches.</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Field for Total Value for each account for the total of all assets listed should be displayed on a summary screen.</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Asset transfer (ability to transfer assets intact from one account to another).</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Ability to add and bill pet fee. Calculate fee amount times quantity of pets.</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Ability to prelist assets for a taxpayer for the next tax year. For example if we determine that certain assets were acquired by an existing taxpayer after billing, but before the next listing period, we would like to be able to prelist these assets for the next tax year without losing the current tax year data as billed and without affecting current year history.</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Ability to maintain accounts with zero tax values, without creating zero (0) tax bills. We want this account to receive a tax listing form for the following tax year.</td>
<td></td>
</tr>
<tr>
<td>Queries</td>
<td>Response</td>
<td>Comments</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>1. Ability to search for accounts by taxpayer (or partial taxpayer name), DBA names (or partial DBA names), Formerly Known As names (or partial Formerly Known As names), business owner name (or partial business owner name), address (mailing or physical), phone number (any in maintenance), Social Security Numbers, Federal ID number.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Ability to access other programs i.e. STARS (software program of the North Carolina Department of Motor Vehicles) and NCTVS website for motor vehicles.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Ability to access Collection files by taxpayer account number, parcel number, taxpayer name, business name. This should be 'View Only' for current and 11 previous years. Ability to search for (but not change or modify) the following: payment history to include amount paid date paid outstanding tax amounts and for which tax years those amounts apply tax rates displayed for year of inquiry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. General query ability to capture specified data and create specialized reports.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Search by key words in taxpayer's name.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Search and query by SIC code.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Query for specified variances in values between tax year by taxpayer.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Query for specified value ranges.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Query for taxpayers with fiscal ending dates other than 12/31.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. List taxpayers without certain information in specified fields.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. List accounts with audit flags.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. List of accounts with a 'date of last</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>Requirement</td>
<td></td>
</tr>
<tr>
<td>-----</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>List of accounts with no additions or deletion over the last specified number of years.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reports and Other Requirements</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ability to carry data forward to the next tax year without losing any data. Mass rollover of assets and taxpayer maintenance from the current year to the next year.</td>
</tr>
<tr>
<td>2</td>
<td>Ability to design templates for printing individual and business personal property abstracts and listing.</td>
</tr>
<tr>
<td>3</td>
<td>Previous year assets should be prelisted by cost and year of acquisition on current listing forms (abstracts).</td>
</tr>
<tr>
<td>4</td>
<td>Ability to print individual and business personal property abstracts and instructions.</td>
</tr>
<tr>
<td>5</td>
<td>Ability to print blank abstracts.</td>
</tr>
<tr>
<td>6</td>
<td>Ability to create monthly tax form for short term rental vehicle gross receipts tax.</td>
</tr>
<tr>
<td>7</td>
<td>Provide ability to print previous years individual and business personal property abstracts on demand or batch including blank.</td>
</tr>
<tr>
<td>8</td>
<td>Apply barcode to each abstract (individual and business). Will require equipment to read barcode and stamp &quot;received&quot; and/or &quot;postmarked&quot; date on each abstract.</td>
</tr>
<tr>
<td>9</td>
<td>Ability to set up new individual and business personal property accounts with a description for each category of personal property (i.e. Business or Personal).</td>
</tr>
<tr>
<td>10</td>
<td>System must apply applicable fire fees to singlewide mobile homes at billing.</td>
</tr>
<tr>
<td>11</td>
<td>Ability to print extension request letter response.</td>
</tr>
<tr>
<td>12</td>
<td>Ability to create list of extensions granted or rejected.</td>
</tr>
<tr>
<td></td>
<td>Description</td>
</tr>
<tr>
<td>---</td>
<td>-------------</td>
</tr>
<tr>
<td>13</td>
<td>Ability to flag each account that is granted an extension of time to list with date to which listing period is extended.</td>
</tr>
<tr>
<td>14</td>
<td>Print rejection letter for abstracts that are returned to taxpayer for being unsigned, filled out incorrectly or incompletely, etc.</td>
</tr>
<tr>
<td>15</td>
<td>Flag accounts that receive rejection letters with date abstract was received and returned to taxpayer.</td>
</tr>
<tr>
<td>16</td>
<td>Ability to print non-liters reports for individual and business personal property</td>
</tr>
<tr>
<td>17</td>
<td>Ability to print non-lister letters for individual and business personal with detail of non-listed personal property and value of each category of property and a grand total of all non-listed personal property.</td>
</tr>
<tr>
<td>18</td>
<td>Maintain infinite year's tax history and have ability to view all history.</td>
</tr>
<tr>
<td>19</td>
<td>Ability to upload tapes from vendor that provides vehicle and single wide mobile home values.</td>
</tr>
<tr>
<td>20</td>
<td>When unregistered motor vehicles or single wide mobile homes are entered into system, system will automatically price vehicles and mobile homes.</td>
</tr>
<tr>
<td>21</td>
<td>Ability to upload electronic data in the future for other taxable personal property such as airplanes and boats, etc.</td>
</tr>
<tr>
<td>22</td>
<td>Ability to pull records as specified in a query and print reports, letters, etc. (i.e. top ten taxpayers, all businesses of a certain type, all taxable assets of a certain type, etc.).</td>
</tr>
</tbody>
</table>

**Billing Collections Technical Requirements**

<table>
<thead>
<tr>
<th>General Requirements</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interfaces with:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Tax collections</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>ESRI ARC/INFO geographic information system GIS.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Appraisal - Real estate &amp; personal property</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>General Ledger</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Lockbox: (Wells Fargo) No processing of payments on a $0 balance.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Auto agent Web Application</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Five Star Consulting NC Debt Setoff Program.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Starz through NCVTS</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Skip trace database i.e.: Accruit</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Wire Transfers from banking institution</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Tax payment website i.e.: (Sturgis, PayPal) Do not want software to allow payment from two parties.</td>
<td></td>
</tr>
</tbody>
</table>

Interfaces to Tyler Technologies Interfaces to Tyler Technologies MUNIS® Version 11.3 or above as updated general ledger for posting of:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Billing information</td>
</tr>
<tr>
<td>2</td>
<td>Late listing fees</td>
</tr>
<tr>
<td>3</td>
<td>Interest charges</td>
</tr>
<tr>
<td>4</td>
<td>Refunds</td>
</tr>
<tr>
<td>5</td>
<td>NSF charges</td>
</tr>
<tr>
<td>6</td>
<td>Collections</td>
</tr>
<tr>
<td>7</td>
<td>Pre-pays</td>
</tr>
<tr>
<td>8</td>
<td>Releases</td>
</tr>
<tr>
<td>9</td>
<td>Supplemental/Discovery</td>
</tr>
<tr>
<td>10</td>
<td>Municipality charges</td>
</tr>
<tr>
<td>11</td>
<td>Misc. Fees</td>
</tr>
</tbody>
</table>

Minimum information maintained for each taxpayer or other name type includes:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Taxpayer name(s), up to 40 spaces per line for names.</td>
</tr>
<tr>
<td>2</td>
<td>Separate Line for Name 1 and Name 2.</td>
</tr>
<tr>
<td>3</td>
<td>Phone number (Limited viewing using security).</td>
</tr>
<tr>
<td>4</td>
<td>Mailing Address (3 lines + city/state/zip) Up to 40 spaces per line for street addresses.</td>
</tr>
<tr>
<td>5</td>
<td>Location/Situs address.</td>
</tr>
<tr>
<td>6</td>
<td>Social Security number (1 per name) (Limited viewing using security).</td>
</tr>
<tr>
<td>7</td>
<td>Ability to link SSN to employer id in employment information database.</td>
</tr>
<tr>
<td></td>
<td>Ability to link SSN to bank routing id in banking information database.</td>
</tr>
<tr>
<td>---</td>
<td>-------------------------------------------------------------------</td>
</tr>
<tr>
<td>9</td>
<td>Date of birth (Limited viewing using security).</td>
</tr>
<tr>
<td>10</td>
<td>Abstract number</td>
</tr>
<tr>
<td>11</td>
<td>Parcel Number / Account Number</td>
</tr>
<tr>
<td>12</td>
<td>Ability to have multiple owners per parcel.</td>
</tr>
<tr>
<td>13</td>
<td>Provides one place of taxpayer account maintenance across all systems (Ability to “tie” separate real estate parcels and personal property accounts to one owner) for billing and collection purposes.</td>
</tr>
<tr>
<td>14</td>
<td>Supports fire fees though billing and collection process. Ability to calculate fire fees based on the state legislation and adopted by the County.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billing</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Automatically generates late listing and other penalties.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ability to process discovery / immaterial irregularity bills for the current year and the 10 previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have the ability to print worksheets with multiple copies and the discovery bill. System should flag a designated space in the taxpayer maintenance file that a discovery has been processed. Ability for user to view all discovery data.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Discovery bill data should include: month and year of discovery, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for discovery, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to process supplemental bills for current year and the five previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have ability to print worksheets with multiple copies and the supplemental bill. System should flag a designated space in the taxpayer maintenance file that a supplement has been processed. Ability for user to view all supplemental data.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Supplemental bill data should include: month and year of supplement, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for supplement, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Ability to process deferred bills for the current year and prior years as desired by user. System should calculate all taxes, penalties and interest for applicable years. System should have the ability to print worksheets with multiple copies and deferred bills. System should flag a designated space in the taxpayer maintenance file that a deferred tax bill has been processed. Ability for user to view all deferred billing data.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Deferred bill data should include: month and year of deferred bill, approval date, parcel number, taxpayer’s name(s) with multiple lines, taxpayer's address with up to 3 lines plus city/state/zip code, township code, municipal code, school code, fire code, special tax district code, description or reason for deferred billing, fire fee or fire tax amount, compute penalties and add interest by designated date.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Ability to process releases to real and personal property accounts for the current year and the 10 previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have ability to print release worksheets with multiple copies and the corrected tax bill. System should flag a designated place in the taxpayer maintenance file that a release has been processed.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Ability for users to view all release information.</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Release data should include: month and year of release, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for release, fire fee or fire tax amount, compute last listing penalty through designated year, last listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Ability to process refunds for the current year and the five previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have the ability to print refund worksheets with multiple copies and corrected tax bill if necessary. System should flag a designated place in the taxpayer maintenance file that a refund has been processed. Ability for user to view all refund information.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Refund data should include: month and year of refund, approval date, account number, parcel number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for refund, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>System should have ability to balance and report all changes generated by discoveries, supplements, releases and refunds.</td>
<td></td>
</tr>
</tbody>
</table>
14 | Ability to generate and print monthly summary reports of discoveries, supplements, deferred billing, releases and refunds. These reports should indicate year of discovery, supplement, deferred billing, release or refund; amount of each tax and fire fee and late listing penalty; amount of value (personal and real value should be defined separately); totals by tax year; totals by levy year; and grand total for month. |

15 | Ability to generate and print year-to-date summary reports of discoveries, supplements, releases and refunds. These reports should indicate year of discovery, supplement, deferred billing, release or refund; amount of each tax and fire fee and late listing penalty; amount of value (personal and real value should be defined separately); totals by year; totals for each month; grand total for year. |

16 | All tax bill calculations and printing must be protected with user security. |

Calculates and prints tax bills with the following minimum information included:

<p>| 1 | Tax Bill number, Account number |
| 2 | Fiscal year Information |
| 3 | Date due &amp; Delinquent After Date |
| 4 | Taxpayers names and address |
| 5 | Township |
| 6 | Parcel identification number |
| 7 | Deed book reference |
| 8 | Description of property &amp; Location/Situs |
| 9 | Number of acres |
| 10 | Number of lots |
| 11 | All Taxing Districts including fire tax districts, |
| 12 | fire fee districts, school district, etc. |
| 13 | Personal property valuation |
| 14 | Real property valuation |
| 15 | Exemption amount |
| 16 | Total value of Farm machinery &amp; Equipment |
| 17 | Use value totals |
| 18 | Market value totals |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>Deferred value totals</td>
</tr>
<tr>
<td>20</td>
<td>Total valuation (Building and real property separated)</td>
</tr>
<tr>
<td>21</td>
<td>County tax rate</td>
</tr>
<tr>
<td>22</td>
<td>School tax rate</td>
</tr>
<tr>
<td>23</td>
<td>Fire tax rate</td>
</tr>
<tr>
<td>24</td>
<td>Municipal rate</td>
</tr>
<tr>
<td>25</td>
<td>County tax</td>
</tr>
<tr>
<td>26</td>
<td>School tax</td>
</tr>
<tr>
<td>27</td>
<td>Fire tax</td>
</tr>
<tr>
<td>28</td>
<td>Fire Fee</td>
</tr>
<tr>
<td>29</td>
<td>Landfill Fee</td>
</tr>
<tr>
<td>30</td>
<td>Pet Fee</td>
</tr>
<tr>
<td>31</td>
<td>Any other Special Fees</td>
</tr>
<tr>
<td>32</td>
<td>Municipal tax</td>
</tr>
<tr>
<td>33</td>
<td>Special tax districts</td>
</tr>
<tr>
<td>34</td>
<td>Special assessment</td>
</tr>
<tr>
<td>35</td>
<td>Late listing penalty</td>
</tr>
<tr>
<td>36</td>
<td>Value Subject to Late Listing Penalty</td>
</tr>
<tr>
<td>37</td>
<td>Delinquent taxes</td>
</tr>
<tr>
<td>38</td>
<td>Interest on delinquent taxes</td>
</tr>
<tr>
<td>39</td>
<td>Total tax due</td>
</tr>
<tr>
<td>40</td>
<td>Amount Due if Paid by Date</td>
</tr>
<tr>
<td>41</td>
<td>Bar code of account number and bill amount</td>
</tr>
<tr>
<td>42</td>
<td>Message field (user-defined)</td>
</tr>
<tr>
<td>43</td>
<td>Ability to view tax bills and all billing information on screen.</td>
</tr>
<tr>
<td>44</td>
<td>Ability to produce bills for one account type only or selection of account types.</td>
</tr>
<tr>
<td>45</td>
<td>Ability to enter tax value furnished by the North Carolina Department of Revenue to the correct account (this is a total amount and is not broken down as to asset type).</td>
</tr>
<tr>
<td>46</td>
<td>Ability to break amount down by the multiple school districts.</td>
</tr>
<tr>
<td>47</td>
<td>Ability to produce bills for Public Utilities from the State Tax Certification form AV-31 and include tax amounts due to collection totals.</td>
</tr>
<tr>
<td></td>
<td>Feature Description</td>
</tr>
<tr>
<td>---</td>
<td>---------------------</td>
</tr>
<tr>
<td>48</td>
<td>Handles billing for multiple owners with percentage interest in parcel.</td>
</tr>
<tr>
<td>49</td>
<td>Bills customized to County’s format, may additionally be required to meet needs of other jurisdictions.</td>
</tr>
<tr>
<td>50</td>
<td>Automatically calculates interest charges and makes interest adjustments for approved releases on delinquent taxes.</td>
</tr>
<tr>
<td>51</td>
<td>Ability to make multiple releases per tax bill.</td>
</tr>
<tr>
<td>52</td>
<td>Provides ability to enter effective date for interest charges on delinquent taxes.</td>
</tr>
<tr>
<td>53</td>
<td>User-defined penalty schedule</td>
</tr>
<tr>
<td>54</td>
<td>Automatically prints all back taxes due on tax bill.</td>
</tr>
<tr>
<td>55</td>
<td>Provides tax levy and valuation information for fiscal year-NC form TR-1 ## (##=fiscal year number) by providing breakdown of values for personal, residential, commercial, industrial &amp; Public Utility property as well as present use value, historic and inside roadway corridors. Not to exclude breakdowns for School districts, municipal districts, motor vehicles and various other requirements made by the State.</td>
</tr>
<tr>
<td>56</td>
<td>Upon entry of a change in property which is no longer eligible for farm deferment, system automatically calculates deferred taxes and provides option of printing tax bill.</td>
</tr>
<tr>
<td>57</td>
<td>Provides user-defined number of years to be used in the back tax calculation for use value/deferment including interest and due date. To produce in written form for estimation and/or collection.</td>
</tr>
<tr>
<td>58</td>
<td>Ability to distribute special assessments collected to various municipalities and other taxing district.</td>
</tr>
<tr>
<td>59</td>
<td>Ability to provide register but no bill for negative bill amounts zero tax bill amounts.</td>
</tr>
<tr>
<td>60</td>
<td>Ability to generate and print property tax bills as well as supplements, discoveries and farm deferment bills on demand in individual or batch mode.</td>
</tr>
<tr>
<td>61</td>
<td>Ability to assign release numbers by user.</td>
</tr>
<tr>
<td>62</td>
<td>Ability to charge tax bills to multiple owners of a single property according to percentage ownership.</td>
</tr>
<tr>
<td>63</td>
<td>System capable of supporting outsourcing of printing.</td>
</tr>
<tr>
<td>64</td>
<td>System does not create bills which are less than a user-defined amount (e.g. $1.00) This can be defined for individual tax districts.</td>
</tr>
<tr>
<td>65</td>
<td>System capable of creating a delinquent tax notification by parcel number.</td>
</tr>
<tr>
<td>66</td>
<td>System is capable of selecting the criteria for the bill print file that is sent to the printer for the mass mailing of the bills i.e.: do not include any with address of 5 West Main St.</td>
</tr>
<tr>
<td>67</td>
<td>All reporting capabilities must account for security at user's level.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Collection Appraisal Reports</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reports to pull valuation totals on all districts and all types of real estate and personal property for estimated tax base and/or tax certification.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Tax Rates &amp; Special Fees for all Tax Districts, including fire and pets.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Tax Scrolls for Real Estate Property Parcels.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Tax Scrolls for Personal Property accounts.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Tax Scrolls for Combined Real Estate &amp; Personal property.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Pre-bill reports i.e.: No fire code, Less than 100% ownership, Owned by multiple accounts, Parcels not on abstract, acreage reconciliation report, exempt accounts with abstract, etc.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Real Estate valuation totals breakdown by property type and tax districts.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Personal Property valuation totals breakdown by Individual, Business and/or combined, property types and tax district with individual tax district breakdowns and summary totals.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>List of pet fees by tax district and totals, including reports for possible data entry errors (i.e., 1,000 pets listed instead of 10).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bills – Ability to print on demand, including municipal bills, supplements, discoveries, deferrals.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Senior Citizen Scrolls – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Exemption Scrolls – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Use Value Scroll – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Historic Scroll – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Business Personal Property Scroll - Alpha</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Individual Personal Property Scroll - Alpha</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Mortgage Scroll – Alpha and/or by Mortgage Co.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Fire Fees by Fire District</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Use Value Letters report</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Exemption Detail with Taxes Loss Report</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Top Ten Taxpayers, Separate by real estate, personal or combination of both</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Historic properties report</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Any report required by the State of North Carolina, ( TR1, AV8, AV50, etc.)</td>
<td></td>
</tr>
</tbody>
</table>

**Collection and Billing Inquiry**

<table>
<thead>
<tr>
<th></th>
<th>Tax collections will have security based on user.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Accounts for the collection of real and personal property taxes.</td>
</tr>
<tr>
<td>3</td>
<td>Subject to the Machinery Act of North Carolina and General Statute 105.</td>
</tr>
<tr>
<td>4</td>
<td>Ability to access system on any pc by use of authorized login credentials. Each clerk must be able to post payments at any pc in the office by the use of an authorized login.</td>
</tr>
<tr>
<td>5</td>
<td>Ability to display all billing information for an individual taxpayer with a single inquiry.</td>
</tr>
<tr>
<td>6</td>
<td>Ability to provide up-to-date tax table information.</td>
</tr>
<tr>
<td>7</td>
<td>During on-line inquiry of taxpayer’s account, status of releases and refunds is displayed.</td>
</tr>
<tr>
<td>8</td>
<td>Ability to display tax levy and valuation information.</td>
</tr>
<tr>
<td>9</td>
<td>Provides for inquiry into tax bill information by:VIN#</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>10</td>
<td>Provides for inquiry into tax bill information by Tag#</td>
</tr>
<tr>
<td>11</td>
<td>Provides for inquiry into tax bill information by Drivers license #’s</td>
</tr>
<tr>
<td>12</td>
<td>Provides for inquiry into tax bill information by Social Security #’s</td>
</tr>
<tr>
<td>13</td>
<td>Provides for inquiry into tax bill information by Addresses: mailing and location.</td>
</tr>
<tr>
<td>14</td>
<td>Provides for inquiry into tax bill information by Township/Map/Parcel.</td>
</tr>
<tr>
<td>15</td>
<td>Provides for inquiry into tax bill information by Taxpayer name.</td>
</tr>
<tr>
<td>16</td>
<td>Provides for inquiry into tax bill information by Parcel Identification number.</td>
</tr>
<tr>
<td>17</td>
<td>Ability to enter unlimited notes for individual taxpayer accounts.</td>
</tr>
<tr>
<td>18</td>
<td>Provides for inquiry into unlimited payment history (minimum 10 years of history) MUST convert 10 years prior history.</td>
</tr>
<tr>
<td>19</td>
<td>Automatic computation of principal and interest for a single account or all accounts.</td>
</tr>
<tr>
<td>20</td>
<td>Provides payment breakdown by various levies, fees, garnishments, penalties, and interest.</td>
</tr>
<tr>
<td>21</td>
<td>Provides for processing of tax releases and ability to change the status of the release.</td>
</tr>
<tr>
<td>22</td>
<td>Ability to print receipts &amp; duplicate receipts (from any pc in office &amp; on demand).</td>
</tr>
<tr>
<td>23</td>
<td>Supports cash drawer.</td>
</tr>
<tr>
<td>24</td>
<td>Properly allocates partial payments.</td>
</tr>
<tr>
<td>25</td>
<td>Ability to both automatically or manually distribute payment to outstanding bills in user-defined order (i.e. payment would first go to the oldest bill then to County interest, County ad valorem, municipality interest, municipality ad valorem, fire interest, fire ad valorem, and then tag fee).</td>
</tr>
<tr>
<td>26</td>
<td>Ability to transfer payments from one account or bill to another with appropriate audit trails and General Ledger interface.</td>
</tr>
</tbody>
</table>
After release is applied to taxpayer’s account, system allows user to immediately print a corrected bill and state “Corrected Bill” on actual bill.

Ability to automatically reflect proper interest.

MUST Provide daily receipts register for balancing by clerk.

Ability to print out statement of all taxes due by a taxpayer name, address or account number on demand.

<table>
<thead>
<tr>
<th>Payment History Screen Detail</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Date/time of transaction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Bill number and receipt number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Total paid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Breakdown of payment (i.e. ad valorem, interest, other fees, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Paid by (option to key in name who paid)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Show refunds on screen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Clerk who posted transaction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Who refund was issued to (ability to key in name)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Release/ void information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Transfer information (if applicable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Type of payment (check, cash, charge, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Checking account/ charge account number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14 Daily receipts register provides distribution by general ledger account number. General Ledger account numbers assigned to each type and payment code.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All registers must provide breakdown of tax information by the following categories:

1 Tax
2 School
3 Fire
4 Late listing
5 Advertisement fee
6 Municipal
7 Municipal tag fees
8 Special assessments (i.e. storm water fee)
9 Tax rate
<table>
<thead>
<tr>
<th></th>
<th>Breakdown of cash, money orders, checks, etc.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Garnishment fees</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interest on each of the above categories, listed separately.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provides interface to general ledger for posting of payment activity.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to determine the general ledger accounts and funds to which journal entries are made for tax transactions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to mark accounts requiring special handling (bankruptcies, garnishments, etc.).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to exempt accounts from interest (i.e.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to send out bills that were forwarded to mortgage companies with special statement indicating bill sent to mortgage company and “do not pay” statement.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to access detailed billing and collections information.</td>
<td></td>
</tr>
</tbody>
</table>

**Collections Inquiry to Appraisal Record History on Parcel**

<table>
<thead>
<tr>
<th></th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Date disposed and type of disposition (master, split, etc.)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Previous owners and previous owner's account number.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Tax values</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Acreage</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>New owner name and address</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Acreage and value for new owner</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Ability to create bill for new owner’s parcel and includes any delinquent taxes on their parcel of property.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Accepts computer-readable payment data from mortgage companies or payment processing organizations. Must be able to code bills with Mortgage Company number prior to billing.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Store all billing, payment and adjustments transactions to taxpayers account on line for 10 statute of limitations. Must convert 10 years of PRIOR RECORDS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to automatically generate delinquency letters, enforced collection letters based on the type of garnishment applied.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Ability to purge old unpaid accounts and insolvent accounts.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Ability to provide duplicate receipts for bills paid in the past.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Show collections by month in: Dollars. Collections on Discoveries should be separate from regular tax.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Shows collections by month or which shows collections by month in: Percent of levy collected.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Shows collections by year as indicated by the Annual Settlement Report.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Show Situs</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Provides ability to write off or purge tax accounts deemed uncollectible based upon user-defined criteria such as date, account, etc.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Displays stats for accounts deemed uncollectible.</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Ability to accept payment on uncollectible accounts.</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Automatic removal of overpayments status message once refund check is issued.</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Record tax payments with full audit trail.</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Total tax due displayed for visual verification prior to posting of payment amount.</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Produce a report of on-line posted payments for settlement prior to General Ledger interface.</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Provide an adjustment function where payments may be corrected by a positive or negative amount if posted in error.</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Warnings on payment and inquiry screen for specific flags such as garnishment, bankruptcy, foreclosure, etc.</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Access to collection/payment screen from inquiry screens.</td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Ability to bar code bills with account number and amount due so cashiers can scan bills in processing payments.</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Ability to account for NSF checks and drafts, i.e. reverse transaction.</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Ability to track how customer paid (i.e. check, money order, cash, with ability to capture bank account number if paid by check or credit card number if paid by charge card if allowed in future by County) Ability to protect field for bank account numbers and card numbers.</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Ability to scan check into system and have image of check attached to payment record (do not have to logon to another system).</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Ability to correct transaction errors before posting to general ledger.</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Ability to inquire on prior years bills (history).</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Ability to do forced collection forms.</td>
<td></td>
</tr>
</tbody>
</table>

**Collection Reports**

<table>
<thead>
<tr>
<th>Collection Reports</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>While we do not expect vendor to exactly replicate our present reports we need to retain the reporting functionality they represent.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>The following reports can be printed by user entered date range and must be capable of being sorted by situs, date, type of tax and levy year.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Release register In Detail.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Prepayments</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Receipts register in detail.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ability to print the Permanent Tax Scroll. All of the accounts being billed for the current year. This record is kept for 10 years.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Receivables list</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Current taxes</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Discoveries</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Overpayment report (list of accounts)</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Refund report</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Tax bills by parcel listing</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Delinquent taxpayers report in detail.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Accounts underpaid/overpaid by one dollar or less.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Taxpayer's receipt</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Prepayments report</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-------------------</td>
<td>---</td>
</tr>
<tr>
<td>16</td>
<td>Lists overall percentage of combined tax collected. Percent of each tax charge collected.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Report for outstanding real estate and personal tax as of month end date. Outstanding Discoveries should be totaled and Regular Tax should be totaled.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Taled—This report is totals (month and year).</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Ability to enter refunds. Ability to enter refund checks. Ability to run a report showing all accounts that has been refunded for a particular month.</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Ability to create tax garnishments on demand or in batch processing based on employer information connected to taxpayers account and housed in the employer database.</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Ability to import refunds into MUNIS A/P.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delinquent Case Collections Processing</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Maintain an employer database with current employer id numbers tied to taxpayer SSN.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ability to add employers to the employer database based on specified id numbers.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Maintain a bank information database based on routing numbers with current routing numbers tied to taxpayer SSN or FID.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to add banks to the database based on federally assigned routing numbers.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Case management system that can hold all of a taxpayers delinquent tax bills in one case with assigning a unique case number that is printed on all delinquent correspondence.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Ability to create tax garnishments on demand or in batch processing based on employer information connected to taxpayers account and housed in the employer database.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to create bank attachments on demand or in batch processing based on information contained in the bank information database and connected to the taxpayers account.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to print any number of form letters in batch or on demand for delinquent accounts.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to create workflow queues automatically for delinquent accounts based on specified criteria for various collection agent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to created collection agent codes for each individual delinquent collector.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to run collection reports for any specified time period by collection agent to gauge productivity.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unlimited space for notes in collection cases.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to create numerous collection statuses to assign to delinquent cases and that status display on customer service inquiry screens.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to block certain collection statuses on account from payments without a supervisor password.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to forecast interest on delinquent letters and print that information on demand.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to stop interest from calculating on certain case statuses.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to &quot;bypass&quot; certain case statuses from other processes.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to created advertising files and adds a fee to each parcel in that file. File should include: Owner property description and amount owed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to close cases that have a zero balance automatically and remove the status from the taxpayers account but leave the status on the bill history for a record of how it was paid.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to print a release of attachment or garnishment on demand or in a batch process.</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Ability to code an account or case related to an account with any collection status deemed necessary.</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Ability to create a menu of various collection status codes.</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Ability to place a payment plan account in default status or on a default report if they have not paid the amount specified within 30 days of the scheduled date of payment.</td>
<td></td>
</tr>
</tbody>
</table>

**Information Technology Technical Requirements**

<table>
<thead>
<tr>
<th>General Requirements</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interfaces with:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Tax collections</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 ESRI ARC/INFO geographic information system GIS.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Appraisal - Real estate &amp; personal property</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 General Ledger</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Lockbox: (Wells Fargo) No processing of payments on a $0 balance.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Auto agent Web Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Five Star Consulting NC Debt Setoff Program.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Starz through NCVTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Skip trace database i.e.: Accruint</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Wire Transfers from banking institution</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Tax payment website i.e.: (Sturgis, PayPal) Do not want software to allow payment from two parties.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Interfaces to Tyler Technologies Interfaces to Tyler Technologies MUNIS® Version 11.3 or above as updated general ledger for posting of:

<p>| 1 Billing information | | |
| 2 Late listing fees  | | |
| 3 Interest charges   | | |
| 4 Refunds            | | |
| 5 NSF charges        | | |
| 6 Collections        | | |
| 7 Pre-pays           | | |
| 8 Releases           | | |
| 9 Supplemental/Discovery | | |</p>
<table>
<thead>
<tr>
<th></th>
<th>Municipality charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Misc. Fees</td>
</tr>
</tbody>
</table>

**Minimum information maintained for each taxpayer or other name type includes:**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Taxpayer name(s), up to 40 spaces per line for names.</td>
</tr>
<tr>
<td>2</td>
<td>Separate Line for Name 1 and Name 2.</td>
</tr>
<tr>
<td>3</td>
<td>Phone number (Limited viewing using security).</td>
</tr>
<tr>
<td>4</td>
<td>Mailing Address (3 lines + city/state/zip) Up to 40 spaces per line for street addresses.</td>
</tr>
<tr>
<td>5</td>
<td>Location/ Situs address.</td>
</tr>
<tr>
<td>6</td>
<td>Social Security number (1 per name) (Limited viewing using security).</td>
</tr>
<tr>
<td>7</td>
<td>Ability to link SSN to employer id in employment information database.</td>
</tr>
<tr>
<td>8</td>
<td>Ability to link SSN to bank routing id in banking information database.</td>
</tr>
<tr>
<td>9</td>
<td>Date of birth (Limited viewing using security).</td>
</tr>
<tr>
<td>10</td>
<td>Abstract number</td>
</tr>
<tr>
<td>11</td>
<td>Parcel Number / Account Number</td>
</tr>
<tr>
<td>12</td>
<td>Ability to have multiple owners per parcel.</td>
</tr>
<tr>
<td>13</td>
<td>Provides one place of taxpayer account maintenance across all systems (Ability to “tie” separate real estate parcels and personal property accounts to one owner) for billing and collection purposes.</td>
</tr>
<tr>
<td>14</td>
<td>Supports fire fees though billing and collection process. Ability to calculate fire fees based on the state legislation and adopted by the County.</td>
</tr>
</tbody>
</table>

**Billing**

<table>
<thead>
<tr>
<th></th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Automatically generates late listing and other penalties.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to process discovery / immaterial irregularity bills for the current year and the 10 previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have the ability to print worksheets with multiple copies and the discovery bill. System should flag a designated space in the taxpayer maintenance file that a discovery has been processed. Ability for user to view all discovery data.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Discovery bill data should include: month and year of discovery, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for discovery, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to process supplemental bills for current year and the five previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have ability to print worksheets with multiple copies and the supplemental bill. System should flag a designated space in the taxpayer maintenance file that a supplement has been processed. Ability for user to view all supplemental data.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Supplemental bill data should include: month and year of supplement, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for supplement, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ability to process deferred bills for the current year and prior years as desired by user. System should calculate all taxes, penalties and interest for applicable years. System should have the ability to print worksheets with multiple copies and deferred bills. System should flag a designated space in the taxpayer maintenance file that a deferred tax bill has been processed. Ability for user to view all deferred billing data.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Deferred bill data should include: month and year of deferred bill, approval date, parcel number, taxpayer's name(s) with multiple lines, taxpayer's address with up to 3 lines plus city/state/zip code, township code, municipal code, school code, fire code, special tax district code, description or reason for deferred billing, fire fee or fire tax amount, compute penalties and add interest by designated date.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Ability to process releases to real and personal property accounts for the current year and the 10 previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have ability to print release worksheets with multiple copies and the corrected tax bill. System should flag a designated place in the taxpayer maintenance file that a release has been processed.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Ability for users to view all release information.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Release data should include: month and year of release, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for release, fire fee or fire tax amount, compute last listing penalty through designated year, last listing penalty, senior citizen exemption amount.</td>
<td></td>
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<td></td>
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<tr>
<td>---</td>
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<td>---</td>
</tr>
<tr>
<td>11</td>
<td>Ability to process refunds for the current year and the five previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have the ability to print refund worksheets with multiple copies and corrected tax bill if necessary. System should flag a designed place in the taxpayer maintenance file that a refund has been processed. Ability for user to view all refund information.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Refund data should include: month and year of refund, approval date, account number, parcel number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for refund, fire fee or fire tax amount, compute late listing penalty through designed year, late listing penalty, senior citizen exemption amount.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>System should have ability to balance and report all changes generated by discoveries, supplements, releases and refunds.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Ability to generate and print monthly summary reports of discoveries, supplements, deferred billing, releases and refunds. These reports should indicate year of discovery, supplement, deferred billing, release or refund; amount of each tax and fire fee and late listing penalty; amount of value (personal and real value should be defined separately); totals by tax year; totals by levy year; and grand total for month.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Ability to generate and print year-to-date summary reports of discoveries, supplements, releases and refunds. These reports should indicate year of discovery, supplement, deferred billing, release or refund; amount of each tax and fire fee and late listing penalty; amount of value (personal and real value should be defined separately); totals by year; totals for each month; grand total for year.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-------------</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>All tax bill calculations and printing must be protected with user security.</td>
<td></td>
</tr>
<tr>
<td>Calculates and prints tax bills with the following minimum information included:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Tax Bill number, Account number</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Fiscal year Information</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Date due &amp; Delinquent After Date</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Taxpayers names and address</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Township</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Parcel identification number</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Deed book reference</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Description of property &amp; Location/Situs</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Number of acres</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Number of lots</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>All Taxing Districts including fire tax districts, fire fee districts, school district, etc.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Personal property valuation</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Real property valuation</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Exemption amount</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Total value of Farm machinery &amp; Equipment</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Use value totals</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Market value totals</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Deferred value totals</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Total valuation (Building and real property separated)</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>County tax rate</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>School tax rate</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Fire tax rate</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Municipal rate</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>County tax</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>School tax</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Fire tax</td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Fire Fee</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Landfill Fee</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Pet Fee</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Any other Special Fees</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Municipal tax</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Special tax districts</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Special assessment</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Late listing penalty</td>
<td></td>
</tr>
<tr>
<td>35</td>
<td>Value Subject to Late Listing Penalty</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>37</td>
<td>Delinquent taxes</td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>Interest on delinquent taxes</td>
<td></td>
</tr>
<tr>
<td>39</td>
<td>Total tax due</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Amount Due if Paid by Date</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Bar code of account number and bill amount</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Message field (user-defined)</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>Ability to view tax bills and all billing information on screen.</td>
<td></td>
</tr>
<tr>
<td>44</td>
<td>Ability to produce bills for one account type only or selection of account types.</td>
<td></td>
</tr>
<tr>
<td>45</td>
<td>Ability to enter tax value furnished by the North Carolina Department of Revenue to the correct account (this is a total amount and is not broken down as to asset type).</td>
<td></td>
</tr>
<tr>
<td>46</td>
<td>Ability to break amount down by the multiple school districts.</td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>Ability to produce bills for Public Utilities from the State Tax Certification form AV-31 and include tax amounts due to collection totals.</td>
<td></td>
</tr>
<tr>
<td>48</td>
<td>Handles billing for multiple owners with percentage interest in parcel.</td>
<td></td>
</tr>
<tr>
<td>49</td>
<td>Bills customized to County’s format, may additionally be required to meet needs of other jurisdictions.</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>Automatically calculates interest charges and makes interest adjustments for approved releases on delinquent taxes.</td>
<td></td>
</tr>
<tr>
<td>51</td>
<td>Ability to make multiple releases per tax bill.</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Provides ability to enter effective date for interest charges on delinquent taxes.</td>
<td></td>
</tr>
<tr>
<td>53</td>
<td>User-defined penalty schedule</td>
<td></td>
</tr>
<tr>
<td>54</td>
<td>Automatically prints all back taxes due on tax bill.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provides tax levy and valuation information for fiscal year-NC form TR-## (##=fiscal year number) by providing breakdown of values for personal, residential, commercial, industrial &amp; Public Utility property as well as present use value, historic and inside roadway corridors. Not to exclude breakdowns for School districts, municipal districts, motor vehicles and various other requirements made by the State.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>56</td>
<td>Upon entry of a change in property which is no longer eligible for farm deferment, system automatically calculates deferred taxes and provides option of printing tax bill.</td>
<td></td>
</tr>
<tr>
<td>57</td>
<td>Provides user-defined number of years to be used in the back tax calculation for use value/deferment including interest and due date. To produce in written form for estimation and/or collection.</td>
<td></td>
</tr>
<tr>
<td>58</td>
<td>Ability to distribute special assessments collected to various municipalities and other taxing district.</td>
<td></td>
</tr>
<tr>
<td>59</td>
<td>Ability to provide register but no bill for negative bill amounts zero tax bill amounts.</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>Ability to generate and print property tax bills as well as supplements, discoveries and farm deferment bills on demand in individual or batch mode.</td>
<td></td>
</tr>
<tr>
<td>61</td>
<td>Ability to assign release numbers by user.</td>
<td></td>
</tr>
<tr>
<td>62</td>
<td>Ability to charge tax bills to multiple owners of a single property according to percentage ownership.</td>
<td></td>
</tr>
<tr>
<td>63</td>
<td>System capable of supporting outsourcing of printing.</td>
<td></td>
</tr>
<tr>
<td>64</td>
<td>System does not create bills which are less than a user-defined amount (e.g. $1.00) This can be defined for individual tax districts.</td>
<td></td>
</tr>
<tr>
<td>65</td>
<td>System capable of creating a delinquent tax notification by parcel number.</td>
<td></td>
</tr>
<tr>
<td>66</td>
<td>System is capable of selecting the criteria for the bill print file that is sent to the printer for the mass mailing of the bills i.e.:</td>
<td></td>
</tr>
</tbody>
</table>
do not include any with address of 5 West Main St.

All reporting capabilities must account for security at user’s level.

<table>
<thead>
<tr>
<th>Collection Appraisal Reports</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reports to pull valuation totals on all districts and all types of real estate and personal property for estimated tax base and/or tax certification.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Tax Rates &amp; Special Fees for all Tax Districts, including fire and pets.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Tax Scrolls for Real Estate Property Parcels.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Tax Scrolls for Personal Property accounts.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Tax Scrolls for Combined Real Estate &amp; Personal property.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Pre-bill reports i.e.: No fire code, Less than 100% ownership, Owned by multiple accounts, Parcels not on abstract, acreage reconciliation report, exempt accounts with abstract, etc.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Real Estate valuation totals breakdown by property type and tax districts.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Personal Property valuation totals breakdown by Individual, Business and/or combined, property types and tax district with individual tax district breakdowns and summary totals.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>List of pet fees by tax district and totals, including reports for possible data entry errors (i.e., 1,000 pets listed instead of 10).</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Bills – Ability to print on demand, including municipal bills, supplements, discoveries, deferments.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Senior Citizen Scrolls – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Exemption Scrolls – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Use Value Scroll – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Historic Scroll – Alpha and/or Numeric</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Business Personal Property Scroll - Alpha</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Individual Personal Property Scroll - Alpha</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Mortgage Scroll – Alpha and/or by</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mortgage Co.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Fire Fees by Fire District</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Use Value Letters report</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Exemption Detail with Taxes Loss Report</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Top Ten Taxpayers, Separate by real estate, personal or combination of both</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Historic properties report</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Any report required by the State of North Carolina, (TR1, AV8, AV50, etc.)</td>
<td></td>
</tr>
</tbody>
</table>

**Collection and Billing Inquiry**

<table>
<thead>
<tr>
<th></th>
<th><strong>Response</strong></th>
<th><strong>Comments</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tax collections will have security based on user.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Accounts for the collection of real and personal property taxes.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Subject to the Machinery Act of North Carolina and General Statute 105.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to access system on any pc by use of authorized login credentials. Each clerk must be able to post payments at any pc in the office by the use of an authorized login.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ability to display all billing information for an individual taxpayer with a single inquiry.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Ability to provide up-to-date tax table information.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>During on-line inquiry of taxpayer's account, status of releases and refunds is displayed.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Ability to display tax levy and valuation information.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Provides for inquiry into tax bill information by: VIN#</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Provides for inquiry into tax bill information by Tag#</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Provides for inquiry into tax bill information by Drivers license #’s</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Provides for inquiry into tax bill information by Social Security #’s</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Provides for inquiry into tax bill information by Addresses: mailing and location.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Provides for inquiry into tax bill information by Township/Map/Parcel.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provides for inquiry into tax bill information by Taxpayer name.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Provides for inquiry into tax bill information by Parcel Identification number.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Ability to enter unlimited notes for individual taxpayer accounts.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Provides for inquiry into unlimited payment history (minimum 10 years of history) MUST convert 10 years prior history.</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Automatic computation of principal and interest for a single account or all accounts.</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Provides payment breakdown by various levies, fees, garnishments, penalties, and interest.</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Provides for processing of tax releases and ability to change the status of the release.</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Ability to print receipts &amp; duplicate receipts (from any pc in office &amp; on demand).</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Supports cash drawer.</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Properly allocates partial payments.</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Ability to both automatically or manually distribute payment to outstanding bills in user-defined order (i.e. payment would first go to the oldest bill then to County interest, County ad valorem, municipality interest, municipality ad valorem, fire interest, fire ad valorem, and then tag fee).</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Ability to transfer payments from one account or bill to another with appropriate audit trails and General Ledger interface.</td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>After release is applied to taxpayer’s account, system allows user to immediately print a corrected bill and state “Corrected Bill” on actual bill.</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Ability to automatically reflect proper interest.</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>MUST Provide daily receipts register for balancing by clerk.</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Ability to print out statement of all taxes due by a taxpayer name, address or account number on demand.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment History Screen Detail</th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
</table>

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<table>
<thead>
<tr>
<th></th>
<th>Date/time of transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Bill number and receipt number</td>
</tr>
<tr>
<td>3</td>
<td>Total paid</td>
</tr>
<tr>
<td>4</td>
<td>Breakdown of payment (i.e. ad valorem, interest, other fees, etc.)</td>
</tr>
<tr>
<td>6</td>
<td>Paid by (option to key in name who paid)</td>
</tr>
<tr>
<td>7</td>
<td>Show refunds on screen</td>
</tr>
<tr>
<td>8</td>
<td>Clerk who posted transaction</td>
</tr>
<tr>
<td>9</td>
<td>Who refund was issued to (ability to key in name)</td>
</tr>
<tr>
<td>11</td>
<td>Release/void information</td>
</tr>
<tr>
<td>12</td>
<td>Transfer information (if applicable)</td>
</tr>
<tr>
<td>13</td>
<td>Type of payment (check, cash, charge, etc.)</td>
</tr>
<tr>
<td>14</td>
<td>Checking account/charge account number</td>
</tr>
</tbody>
</table>

**Notes**

- **Daily** receipts register provides distribution by general ledger account number. General Ledger account numbers assigned to each type and payment code.

All registers must provide breakdown of tax information by the following categories:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tax</td>
</tr>
<tr>
<td>2</td>
<td>School</td>
</tr>
<tr>
<td>3</td>
<td>Fire</td>
</tr>
<tr>
<td>4</td>
<td>Late listing</td>
</tr>
<tr>
<td>5</td>
<td>Advertisement fee</td>
</tr>
<tr>
<td>6</td>
<td>Municipal</td>
</tr>
<tr>
<td>7</td>
<td>Municipal tag fees</td>
</tr>
<tr>
<td>8</td>
<td>Special assessments (i.e. storm water fee)</td>
</tr>
<tr>
<td>9</td>
<td>Tax rate</td>
</tr>
<tr>
<td>10</td>
<td>Breakdown of cash, money orders, checks, etc.</td>
</tr>
<tr>
<td>11</td>
<td>Garnishment fees</td>
</tr>
<tr>
<td>12</td>
<td>Interest on each of the above categories, listed separately.</td>
</tr>
<tr>
<td>13</td>
<td>Provides interface to general ledger for posting of payment activity.</td>
</tr>
<tr>
<td>14</td>
<td>Ability to determine the general ledger accounts and funds to which journal entries are made for tax transactions.</td>
</tr>
<tr>
<td>15</td>
<td>Ability to mark accounts requiring special handling (bankruptcies, garnishments, etc.).</td>
</tr>
<tr>
<td></td>
<td>Ability to exempt accounts from interest (i.e.)</td>
</tr>
<tr>
<td>---</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>16</td>
<td>Ability to send out bills that were forwarded to mortgage companies with special statement indicating bill sent to mortgage company and “do not pay” statement.</td>
</tr>
<tr>
<td>17</td>
<td>Ability to access detailed billing and collections information.</td>
</tr>
</tbody>
</table>

**Collections Inquiry to Appraisal Record History on Parcel**

<table>
<thead>
<tr>
<th></th>
<th>Date disposed and type of disposition (master, split, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Previous owners and previous owner's account number.</td>
</tr>
<tr>
<td>2</td>
<td>Tax values</td>
</tr>
<tr>
<td>3</td>
<td>Acreage</td>
</tr>
<tr>
<td>4</td>
<td>New owner name and address</td>
</tr>
<tr>
<td>5</td>
<td>Acreage and value for new owner</td>
</tr>
<tr>
<td>6</td>
<td>Ability to create bill for new owner's parcel and includes any delinquent taxes on their parcel of property.</td>
</tr>
<tr>
<td>7</td>
<td>Accepts computer-readable payment data from mortgage companies or payment processing organizations. Must be able to code bills with Mortgage Company number prior to billing.</td>
</tr>
<tr>
<td>8</td>
<td>Store all billing, payment and adjustments transactions to taxpayers account on line for 10 statute of limitations. Must convert 10 years of PRIOR RECORDS</td>
</tr>
<tr>
<td>9</td>
<td>Ability to automatically generate delinquency letters, enforced collection letters based on the type of garnishment applied.</td>
</tr>
<tr>
<td>10</td>
<td>Ability to purge old unpaid accounts and insolvent accounts.</td>
</tr>
<tr>
<td>11</td>
<td>Ability to provide duplicate receipts for bills paid in the past.</td>
</tr>
<tr>
<td>12</td>
<td>Show collections by month in: Dollars. Collections on Discoveries should be separate from regular tax.</td>
</tr>
<tr>
<td>13</td>
<td>Shows collections by month or which shows collections by month in: Percent of levy</td>
</tr>
<tr>
<td></td>
<td>Description</td>
</tr>
<tr>
<td>---</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>15</td>
<td>Shows collections by year as indicated by the Annual Settlement Report.</td>
</tr>
<tr>
<td>16</td>
<td>Show Situs</td>
</tr>
<tr>
<td>17</td>
<td>Provides ability to write off or purge tax accounts deemed uncollectible based upon user-defined criteria such as date, account, etc.</td>
</tr>
<tr>
<td>18</td>
<td>Displays stats for accounts deemed uncollectible.</td>
</tr>
<tr>
<td>19</td>
<td>Ability to accept payment on uncollectible accounts.</td>
</tr>
<tr>
<td>20</td>
<td>Automatic removal of overpayments status message once refund check is issued.</td>
</tr>
<tr>
<td>21</td>
<td>Record tax payments with full audit trail.</td>
</tr>
<tr>
<td>22</td>
<td>Total tax due displayed for visual verification prior to posting of payment amount.</td>
</tr>
<tr>
<td>23</td>
<td>Produce a report of on-line posted payments for settlement prior to General Ledger interface.</td>
</tr>
<tr>
<td>24</td>
<td>Provide an adjustment function where payments may be corrected by a positive or negative amount if posted in error.</td>
</tr>
<tr>
<td>25</td>
<td>Warnings on payment and inquiry screen for specific flags such as garnishment, bankruptcy, foreclosure, etc.</td>
</tr>
<tr>
<td>26</td>
<td>Access to collection/payment screen from inquiry screens.</td>
</tr>
<tr>
<td>27</td>
<td>Ability to bar code bills with account number and amount due so cashiers can scan bills in processing payments.</td>
</tr>
<tr>
<td>28</td>
<td>Ability to account for NSF checks and drafts, i.e. reverse transaction.</td>
</tr>
<tr>
<td>29</td>
<td>Ability to track how customer paid (i.e. check, money order, cash, with ability to capture bank account number if paid by check or credit card number if paid by charge card if allowed in future by County) Ability to protect field for bank account numbers and card numbers.</td>
</tr>
<tr>
<td></td>
<td>Ability to scan check into system and have image of check attached to payment record (do not have to logon to another system).</td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>31</td>
<td>Ability to correct transaction errors before posting to general ledger.</td>
</tr>
<tr>
<td>32</td>
<td>Ability to inquire on prior years bills (history).</td>
</tr>
<tr>
<td>33</td>
<td>Ability to do forced collection forms.</td>
</tr>
</tbody>
</table>

**Collection Reports**

<table>
<thead>
<tr>
<th></th>
<th>Response</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The following reports can be printed by user entered date range and must be capable of being sorted by situs, date, type of tax and levy year.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Release register in detail.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Prepayments</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Receipts register in detail.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ability to print the Permanent Tax Scroll. All of the accounts being billed for the current year. This record is kept for 10 years.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Receivables list</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Current taxes</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Discoveries</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Overpayment report (list of accounts)</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Refund report</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Tax bills by parcel listing</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Delinquent taxpayers report in detail.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Accounts underpaid/overpaid by one dollar or less.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Taxpayer’s receipt</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Prepayments report</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Lists overall percentage of combined tax collected. Percent of each tax charge collected.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Report for outstanding real estate and personal tax as of month end date. Outstanding Discoveries should be totaled and Regular Tax should be totaled.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Totaled—This report is totals (month and year).</td>
<td></td>
</tr>
</tbody>
</table>

While we do not expect vendor to exactly replicate our present reports we need to retain the reporting functionality they represent.
<p>|   | Ability to enter refunds. Ability to enter refund checks. Ability to run a report showing all accounts that has been refunded for a particular month. |
|   | Ability to create tax garnishments on demand or in batch processing based on employer information connected to taxpayers account and housed in the employer database. |
|   | Ability to import refunds into MUNIS A/P. |
| <strong>Delinquent Case Collections Processing</strong> | <strong>Response</strong> | <strong>Comments</strong> |
| 1 | Maintain an employer database with current employer id numbers tied to taxpayer SSN. |   |
| 2 | Ability to add employers to the employer database based on specified id numbers. |   |
| 3 | Maintain a bank information database based on routing numbers with current routing numbers tied to taxpayer SSN or FID. |   |
| 4 | Ability to add banks to the database based on federally assigned routing numbers. |   |
| 5 | Case management system that can hold all of a taxpayers’ delinquent tax bills in one case with assigning a unique case number that is printed on all delinquent correspondence. |   |
| 6 | Ability to create tax garnishments on demand or in batch processing based on employer information connected to taxpayers account and housed in the employer database. |   |
| 7 | Ability to create bank attachments on demand or in batch processing based on information contained in the bank information database and connected to the taxpayers account. |   |
| 8 | Ability to print any number of form letters in batch or on demand for delinquent accounts. |   |
| 9 | Ability to create workflow queues automatically for delinquent accounts based on specified criteria for various collection agent. |   |</p>
<table>
<thead>
<tr>
<th></th>
<th>Ability to create collection agent codes for each individual delinquent collector.</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Ability to run collection reports for any specified time period by collection agent to gauge productivity.</td>
</tr>
<tr>
<td>12</td>
<td>Unlimited space for notes in collection cases.</td>
</tr>
<tr>
<td>13</td>
<td>Ability to create numerous collection statuses to assign to delinquent cases and that status display on customer service inquiry screens.</td>
</tr>
<tr>
<td>14</td>
<td>Ability to block certain collection statuses on account from payments without a supervisor password.</td>
</tr>
<tr>
<td>15</td>
<td>Ability to forecast interest on delinquent letters and print that information on demand.</td>
</tr>
<tr>
<td>16</td>
<td>Ability to stop interest from calculating on certain case statuses.</td>
</tr>
<tr>
<td>17</td>
<td>Ability to &quot;bypass&quot; certain case statuses from other processes.</td>
</tr>
<tr>
<td>18</td>
<td>Ability to created advertising files and adds a fee to each parcel in that file. File should include: Owner property description and amount owed.</td>
</tr>
<tr>
<td>19</td>
<td>Ability to close cases that have a zero balance automatically and remove the status from the taxpayers account but leave the status on the bill history for a record of how it was paid.</td>
</tr>
<tr>
<td>20</td>
<td>Ability to print a release of attachment or garnishment on demand or in a batch process.</td>
</tr>
<tr>
<td>21</td>
<td>Ability to code an account or case related to an account with any collection status deemed necessary.</td>
</tr>
<tr>
<td>22</td>
<td>Ability to create a menu of various collection status codes.</td>
</tr>
<tr>
<td>23</td>
<td>Ability to place a payment plan account in default status or on a default report if they have not paid the amount specified within 30 days of the scheduled date of payment.</td>
</tr>
</tbody>
</table>
F. **Additional Factors To Be Considered In Awarding Contract:**

All software to be provided under this Request for Proposal shall fully comply with and work with all provisions of Subchapter II of Chapter 105 of the North Carolina General Statutes as they presently exist or as they are from time to time hereafter amended or supplemented.

A selection committee, consisting of representatives from Macon County staff will review the proposals submitted. Macon County expects references related to quality of service and ability to deliver, and support services from each Proposer.

Proposer’s proposal will be evaluated using the following criteria:

1. **Price** - All-Inclusive costs detailed. Please provide specifics for software licensing, annual support, third party software licensing that may apply Implementation and training. (10 possible points)

2. **Company history, stability and financial resources.** (10 possible points)

3. **References** - Please include references with similar implementation in the state of North Carolina or nearby installations. (10 possible points)

4. **Design & Implementation Plan** - Quality of system design (Proposer’s responses to scope of services form), (Proposer’s responses to Technical Requirements form), hardware specifications and implementation plan. (30 possible points)

5. **Experience** - Company experience and expertise in installing CAMA system software. (15 possible points)

6. **Support** - Availability and degree of software support during and after installation. (25 possible points)

The selection committee will make a recommendation to Macon County of the person or entity that submits the best overall proposal. County may reject any or all proposals for any reason.

Pursuant to G.S. N.C. General Statutes § 143-129.8 Purchase of information technology goods and services, the County may negotiate with the proposer in order to obtain a final contract that best meets the needs of the County.
NON-COLLUSION AFFIDAVIT

MACON COUNTY
REQUEST FOR PROPOSAL, NO. 01-4140p

“State of the Art” automated Computer Assisted Mass Appraisal (CAMA) solution along with tax office suite of software (TSS, including tax assessment, tax collections and land record software.

The undersigned affirms that the proposal made here-in is made without any connections with any other person, or persons, making any other proposal for the above item(s): that it is in all respects fair and without collusion or fraud:

That______________________________________________ (Firm Name) is not connected in any official capacity with Macon County, and that no person, or persons, acting in such a capacity are directly, or indirectly, interested herein or in any of the profit arising or anticipated from this transaction.

In making this proposal, it is understood and agreed, that the conditions set forth in the advertisement for bids, instructions to bidders, terms and conditions and specifications together with the proposal shall form a part of and be construed with the contract under the same.

The acceptance of this proposal by Macon County, as evidenced by the issuance of a Macon County Purchase Order, will be held to be a mutual agreement as to each and every clause of this proposal and to constitute a contract between the parties hereto.

FIRM NAME: ________________________________________________________________
ADDRESS: ________________________________________________________________
BY: _______________________________________________________________________
TITLE: ________________________________________________________________

Sworn to and subscribed before me, this _______ day of _____________, 20______.

_______________________________________
Notary Public

My commission expires: ________________
RFP NO. 01-4140p
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REQUEST FOR PROPOSAL FORM

“State of the Art” automated Computer Assisted Mass Appraisal (CAMA) solution along with tax office suite of software (TSS, including tax assessment, tax collections and land record software.

RFP NO. 01-4140p

Proposal Furnished by: ____________________________________________

Address: _______________________________________________________

Telephone Number: ________________  Cell Phone Number: ________________

Fax Number: _______________________

We who furnish this proposal have carefully examined the instructions in this RFP, completed the Non-Collusion Affidavit, reviewed the Specifications, and all Addenda which we list below, and therefore furnish this bid proposal.

Addenda (if none, state “N/A”): #1 __________, #2 __________, #3 __________.

Date of Submittal: _______________________

By: ________________________________

Authorized Signature