REQUEST FOR PROPOSALS

FOR A

MASS APPRAISAL SYSTEM

Galveston Central Appraisal District
9850 Emmett F. Lowry Expressway Ste. A101
Texas City, TX 77591
gcad@galvestoncad.org
409-935-1980

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GALVESTON CENTRAL APPRAISAL DISTRICT
REQUEST FOR PROPOSALS (RFP) FOR
COMPUTER-ASSISTED MASS APPRAISAL (CAMA) SYSTEM
RFP No. GCAD-2025-CAMA

1. INTRODUCTION & PURPOSE

The Galveston Central Appraisal District ("GCAD") is soliciting proposals from qualified vendors to provide a fully cloud-hosted, enterprise-grade Computer-Assisted Mass Appraisal ("CAMA") system that supports GCAD's statutory responsibilities under the Texas Property Tax Code, Comptroller Property Tax Assistance Division (PTAD) requirements, Uniform Standards of Professional Appraisal Practice (USPAP), and the International Association of Assessing Officers (IAAO) standards.

The selected CAMA system must improve appraisal accuracy and uniformity, increase operational efficiency, support modern online taxpayer and agent services, and provide a secure, auditable platform for all appraisal, appeals, litigation, and related activities.

GCAD is a political subdivision of the State of Texas. GCAD is responsible for the appraisal of property in Galveston County for ad valorem tax purposes as charged by Texas law. The appraisals performed by GCAD are used by taxing units to calculate and allocate the annual tax burden. In addition to appraising property, GCAD implements other provisions of law, such as making determinations on exemptions, performing statutorily defined special-use appraisals, and supporting an administrative protest process for property owners, among other duties and responsibilities.

GCAD currently performs appraisals and other services for approximately 211,600 parcels of property, supporting 82 taxing unit jurisdictions (including eight independent school districts) with a total market value exceeding $77.73 billion.

2. PROJECT GOALS & OBJECTIVES

2.1 Appraisal Accuracy & Transparency

- The system must support cost, income, and market approaches to value for various property types, including but not limited to real property (including improvements) and business personal property, and including various property types, such as residential, multi-tenant residential, commercial, mineral, complex industrial, among others.
- The system must include tools for equity value analysis, ratio studies, and statistical performance monitoring.
- The system must maintain a complete audit trail of all CAMA entries and modifications, including user, date, time, and reason.

- The system must support reproduction of value conclusions for ARB, Litigation, Arbitration, and audit purposes.

2.2 Staff Efficiency & Workflow

- The system must include configurable workflow tools that allow GCAD to define, assign, and track tasks across all departments.
- The system should have support for OCR document processing to minimize manual data entry.
- The system must support queue-based work management with user- and role-specific worklists.
- The system must automate repetitive tasks where feasible while preserving manual reviews where required by policy or law.

2.3 Digital Services

- The system must support or work with other vendors to include a secure taxpayer portal for appeals, document submission, and account inquiry.
- The system must support an agent portal for mass representation, bulk filings, and evidence exchange.
- The system must support online scheduling and management of ARB and informal meetings.
- The system must support integrated virtual hearings or integrate with commonly used virtual meeting platforms.

2.4 Cloud Hosting & Availability

- The system must be delivered as a fully cloud-hosted Software-as-a-Service (SaaS) solution.
- The hosting environment must provide a minimum of 99.9% up-time, measured on a monthly basis, excluding scheduled maintenance windows agreed to by GCAD.
- The hosting provider must support geographic redundancy and disaster recovery capabilities with an RTO of 6 hours or less for critical services.
- The vendor must provide details of the data center locations, certifications, and security controls.

2.5 Compliance & Security

- The system must comply with applicable provisions of the Texas Property Tax Code, particularly those governing appraisal records, notices, protests, and roll certification.
- The system must support compliance with USPAP Standards 5 & 6 – Mass Appraisal and applicable IAAO standards.
- The system and hosting environment must be covered by a current SOC 2 Type II report, or the vendor must provide a detailed timeline and interim controls if certification is in progress.
- The system must support end-to-end encryption, strong access controls, and auditable security logging.

3. SCOPE OF WORK

The selected vendor will provide all software, hosting, implementation services, data conversion, training, and ongoing support necessary to deliver a fully functional CAMA system. Including the following, at a minimum:

3.1 Core Appraisal Functionality – Market & Income Approaches

- Support market (sales comparison) approaches, including comparable selection, automated adjustment grids, and reconciliation tools.
- Support income-based valuation for appropriate property types, including configuration of potential gross income, vacancy, operating expenses, capitalization rates, and yield capitalization where applicable.
- Allow GCAD to define and maintain market models, schedules, and calibration parameters with effective dates and versioning.
- Provide tools for performing ratio studies, sales chasing analysis, and other statistical performance measures consistent with PTAD and IAAO guidelines.

3.2 Core Appraisal Functionality – Cost Modeling and External Cost Service Integration

The system must provide robust cost-based valuation capabilities for both residential and commercial properties, including integration with external cost services. At a minimum, the system must:

- Provide full support for cost-based valuation of residential, commercial, industrial, and special-use improvements.
- Provide the capability to integrate with current cost manual services, including but not limited to Marshall & Swift / SwiftEstimator (CoreLogic), RSMeans, or equivalent cost data providers.
- Allow import, update, and application of Marshall & Swift or equivalent cost schedules, including automatic adjustment for local cost multipliers, construction types, occupancy types, and quality classes.
- Support depreciation modeling, including physical deterioration, functional obsolescence, and external (economic) obsolescence, using configurable tables and factors.
- Automatically calculate replacement cost new (RCN), replacement cost new less depreciation (RCNLD), and contributory value for improvements, with full audit traceability.
- Maintain version control of all cost tables, including effective dates, and allow users to view and apply historical cost tables for prior-year valuation and audit support.
- Allow GCAD to define user-specific cost classes, modifiers, and local adjustments while preserving vendor-provided base cost schedules.
- Produce transparent calculation sheets for each improved property showing the key cost assumptions, quantities (e.g., square footage), cost rates, time adjustment indices, depreciation, and final calculated values.
- Integrate cost-derived values with income and market valuation modules to support reconciliation and documentation of the final value conclusion.

- Provide a method for preserving historical cost tables and calculation logic for use in ARB hearings, Litigation, Arbitrations, and Comptroller/PTAD reviews.

3.3 Protests, Appraisal Review Board, Arbitrations, Appeals, and Litigation

- Support electronic protest filing by property owners and agents, including the ability to attach supporting documents.
- Automatically create and route workflow items when protests are filed, including informal and formal hearing preparation tasks.
- Provide ARB scheduling tools to manage dockets, panels, hearing times, and room assignments.
- Support generation of evidence packets, notices, and ARB orders directly from the system.
- Include modules or capabilities to track litigation, arbitration, and SOAH cases, including key dates, documents, and outcomes.
- Support recording of settlement agreements and automatic creation of roll corrections where appropriate.

3.4 Workflow, Reporting, and Business Intelligence

- Provide a configurable workflow engine that allows GCAD to define work types, routing rules, approvals, and service-level targets.
- Include business intelligence (BI) reporting tools that enable GCAD staff to design, save, and run reports without vendor intervention.
- Allow scheduled report generation and automatic distribution via email or secure portal to authorized users.
- Provide dashboard capabilities to present key performance indicators (KPIs), workload metrics, and appraisal performance metrics.

3.5 Public and Agent Portals

- Provide a secure taxpayer portal that supports property search, online protest filing, uploading documents, viewing notices and tax-related information as permitted by law.
- Provide an agent portal that supports representation of multiple accounts, bulk protest filing, mass downloading of evidence and notices, and secure communication with GCAD.
- Support online submission of homestead applications, business personal property renditions, and other commonly requested forms, with appropriate validation and routing into workflow queues.
- Provide clear audit logs of portal activity linked to the corresponding appraisal records.

4. TECHNICAL REQUIREMENTS

4.1 System Architecture

- The system must be delivered as a fully cloud-hosted Software-as-a-Service (SaaS) solution.

- The system must be accessible via a modern web browser (Google Chrome is required; support for other browsers is preferred).
- The architecture must support horizontal and/or vertical scalability to accommodate growth in parcels, users, and processing needs.
- The vendor must describe the application architecture, including tiers, load balancing, and multi-tenancy where applicable.

4.2 Database & Data Access

- The system must use a relational database management system (RDBMS) such as Microsoft SQL Server, PostgreSQL, or an equivalent enterprise-grade platform.
- The system must provide GCAD with the ability to run ad hoc queries and produce exports via ODBC, JDBC, or other secure methods approved by GCAD.
- The system must maintain referential integrity and provide controls to prevent orphaned or inconsistent data relationships.
- The vendor must describe data backup, retention, and point-in-time recovery capabilities along with any associated costs.

4.3 Cost Services Interface (Marshall & Swift / Other Providers)

The system must support robust integration with external cost services that are widely used in the appraisal industry. At a minimum, the system must:

- Support API-based, web-service, or secure file-based integration with Marshall & Swift / SwiftEstimator (CoreLogic) and other recognized cost service providers or provide equivalent embedded cost data with similar functionality.
- Allow GCAD to select and configure cost models by property type, occupancy type, construction class, quality grade, and other relevant classification attributes.
- Maintain strict version control of all imported or embedded cost tables, including effective dates, notes, and the ability to view prior versions.
- Automatically apply local and regional construction cost indices, time adjustment factors, and location modifiers in accordance with the cost service provider's methodology.
- Support configuration and application of depreciation schedules, including physical, functional, and external components, and support the definition of custom depreciation tables by GCAD.
- Expose detailed cost calculations in a user-friendly format for hearings and litigation, including quantities, base costs, modifiers, indexes, depreciation, and final value conclusions.
- Enable GCAD to preserve historical cost tables and calculations for prior years to support ARB hearings, litigation, Comptroller/PTAD reviews, and internal quality control audits.
- Provide clear documentation of how cost data is updated (frequency, process, and testing) and allow GCAD to control when new cost tables are promoted into production.
- Support reconciliation between cost-derived values and market and income approaches, including the ability to document the final reconciled value and rationale.

4.4 Security & Compliance

- The system and hosting environment must be covered by the current SOC 2 Type II report. If the report is in progress, the vendor must supply evidence of interim controls and an estimated completion date.
- All data in transit between client browsers and the hosting environment must be encrypted using TLS 1.2 or higher.
- All data at rest must be encrypted using industry-accepted methods and key management practices.
- The system must support multi-factor authentication (MFA) for administrative and remote access and must allow GCAD to enforce password and session policies.
- The vendor must maintain detailed security logs and provide GCAD with access to security event information relevant to GCAD's data and usage.
- The vendor must have an incident response plan and must notify GCAD promptly in the event of a security incident affecting GCAD data.

4.5 Accessibility

- The system, including public-facing portals, must substantially comply with WCAG 2.1 AA accessibility guidelines.
- The vendor must provide a current Voluntary Product Accessibility Template (VPAT) or equivalent documentation describing accessibility conformance.
- The system must be usable with common screen readers and assistive technologies.

5. DATA CONVERSION REQUIREMENTS

- Vendor must provide a detailed data conversion plan covering all existing GCAD appraisal, ownership, exemption, and related data.
- Vendor must convert at least ten (10) years of historical appraisal data, or an alternate period proposed by the vendor and approved by GCAD.
- Vendor must convert associated documents, images, and roll history where technically feasible.
- Vendor must support multiple test conversions and provide validation tools and reports to confirm accuracy before final cutover.

6. IMPLEMENTATION REQUIREMENTS

- Vendor must assign a dedicated Project Manager as the primary point of contact for the duration of the implementation.
- Vendor must provide a detailed project plan including tasks, deliverables, dependencies, and timelines.
- Users, customer service, and ARB support staff.
- Vendor must support a parallel operations period, during which the legacy system and new system are run concurrently until GCAD confirms functional readiness and data accuracy.

7. SERVICE LEVEL REQUIREMENTS

- Vendor must provide a minimum production system uptime of 99.9% measured monthly, excluding scheduled maintenance windows.
- Vendor must respond to critical issues within 1 hour and provide status updates until resolution, not to exceed 48 hours between updates.
- Vendor must conduct at least one annual disaster recovery test that includes GCAD's environment and provide a summary report.
- Vendor must provide GCAD with access to a support portal and case tracking system.

8. EVALUATION CRITERIA

Proposals will be evaluated using the following criteria:

- Technical Merit & Functionality – 30%
- Vendor Experience & References – 20%
- Implementation Plan & Project Management – 15%
- Usability & Demonstration – 15%
- Cost Proposal – 15%
- Cybersecurity & Hosting – 5%

GCAD reserves the right to consider all factors it deems relevant and to negotiate with vendors that meet the minimum requirements established using the above criteria to achieve the best value and platform for the District and taxpayers of Galveston County.

9. COST PROPOSAL

The Firm should supply an accurate and detailed estimate of all costs associated with procuring all necessary components of a complete CAMA system for the District. The Firm must complete the included Cost Submission Form and all other supporting documentation, along with their proposal. Please include cost information regarding the following elements:

9.1 Software License

Please provide a detailed summary of the total cost to acquire the software license for your CAMA system that will adequately serve the District's current and future needs. If necessary, please supplement specifically what the license agreement will include. (For example: does the license agreement provide only the use of the software, or will the source code be conveyed or transferred with the license agreement?)

9.2 Hardware Purchases

Please provide a detailed summary and an itemized list of the hardware requirements for your CAMA system.

9.3 Project Labor

Please provide a detailed summary of the total cost of labor associated with this

project, including the estimated number of hours to complete the project, along with the hourly rate. If the Firm does not charge by the hour, please state the total project labor cost as a flat fee.

9.4 Conversion Cost

If not included as part of the project labor cost, please provide a detailed summary of the estimated cost to convert historical data from the District's current CAMA system into the Firm's CAMA system. Please provide either the total cost to convert the current year and the past five years or the current year and the past ten years. Additionally, please provide a cost estimate to convert a single year of historical data, so the District can determine how many years it can afford to convert.

9.5 Third Party Software

Please provide any additional costs associated with third-party software required by the Firm's CAMA system that are not already included in the software license fee.

9.6 Training Cost

Please provide a detailed summary of the initial training the District's staff will receive once the installation and conversion are complete, and provide the cost associated with the training if said training is not included with the purchase of the software license fee. Additionally, and as an addendum, please provide a summary of the costs associated with additional training for District staff if this cost is not included with the annual support and maintenance fee. If additional training does entail additional cost, please provide either the flat fee cost or the hourly rate for additional training.

9.7 Cost to Modify Totals

Please provide a summation of all cost elements to modify your software, which should be detailed in the software design details matrix attached. If there were no additional cost to modify certain elements of the Firm's current system to meet the specific needs of the District, then indicate zero cost.

9.8 Total Proposed Net Cost

Please provide a summation of the total cost of the project. This cost should represent the total "out-of-pocket" cost the District should expect to pay in order to obtain a complete working CAMA system, which meets or exceeds all of the expectations of the District, from your Firm. This total cost will be net of any exceptions, additional training, annual maintenance and support, and the cost to convert any additional years of historical data.

9.9 Annual Support and Maintenance

Please provide the expected recurring annual unlimited support and maintenance for the term of any contract between the District and the Firm for the Firm's CAMA system. As an addendum to the Cost Submission Form, please detail a summary of what benefits, enhancements, or enrichments the District will receive, at no additional cost, as a result of the annual support and maintenance.

9.10 Supplemental Development

As an addendum to the Cost Submission Form, please provide a detailed summary of the estimated cost and process of future or supplemental software development. For example, when the District approaches the Firm with suggested enhancements or improvements to existing source code, are there fees associated with new development for the perceived enhancement or benefit? Financing Availability: As an addendum to the Cost Submission Form, please provide a detailed explanation of the possible financing options available to the district.

10. MANDATORY FORMS

- Vendor's Standard Contract
- Conflict of Interest and Disclosure forms as required by Texas law.
- Cybersecurity Attestation and SOC 2 Type II documentation or equivalent.
- VPAT or equivalent accessibility documentation.
- Reference List including at least three appraisal districts or similar agencies.
- Completed Pricing Workbook or Schedule.

11. PROJECT TIMELINE

1. RFP Issue Date: December 15, 2025.
- Vendor Question Deadline: January 16, 2026.
- Proposal Submission Deadline: January 29, 2026.
- Vendor Demonstrations: Prior to February 10, 2026
- Anticipated Award Date: February - March, 2026

12. LEGAL & CONTRACTUAL REQUIREMENTS

- The contract resulting from this RFP will be governed by the laws of the State of Texas, with venue in Galveston County.
- GCAD will retain ownership of all data, configurations, and derivative datasets created or hosted within the system.
- Vendor may not use GCAD data for any purpose other than providing contracted services and must not retain GCAD data after contract termination except as required by law or agreed to by GCAD.
- The contract will include provisions for termination for cause and termination for convenience, with appropriate notice requirements.
- GCAD is subject to the Texas Public Information Act; the vendor must cooperate with GCAD in responding to public information requests while appropriately asserting any applicable confidentiality protections.
- Vendor shall indemnify and hold harmless GCAD from all claims arising from the system.
- As part of the proposal, the Vendor must certify that the pricing, terms, warranties, and conditions offered to GCAD are no less favorable than those offered to any

other appraisal district, governmental entity, or political subdivision within the State of Texas for substantially similar products and services.

- Vendor must acknowledge that should it offer more favorable pricing, terms, warranties, or conditions for substantially similar products or services to another Texas government entity at any time during the resulting contract terms, the Vendor will be required to disclose such change to GCAD and make those same favorable terms available to GCAD. Failure to comply with this requirement may be considered a material breach of the resulting contract.
- Any proposal, to include cost, must be valid no less than 90 days from the proposal's submission deadline.
- GCAD reserves the right to reject any or all proposals and waive informalities. Submission of a proposal does not obligate GCAD to award a contract.
- GCAD reserves the right to select the proposal deemed to be in the best interest of the district, and to select the bidder who provides goods or services at the best value for the District as described in Section 252.043 of the Texas Local Government Code.

13. BIDDER QUALIFICATIONS AND REFERENCES

- Proven implementation in at least one Texas appraisal district with 125,000+ parcels, including two complete appraisal cycles using the proposed solution.
- Vendor will provide a list of current CAMA clients along with parcel count and go-live dates.
- Provide the current software version number along with release history for the last three major releases, along with release notes for those releases.
- Please provide in detail the Firm's experience providing CAMA services to appraisal districts, or related entities, within and outside the State of Texas. Include in this description a list of jobs/clients currently under contract and/or completed within the last year.
- Please provide in detail a list of the team members that will likely be assigned to this project, if subsequently awarded, and specify their experience related to their role on the team.
- Please describe the current financial stability and solvency of the Firm and the Firm's goals to remain solvent over the long term. If available, please provide a Form 10-K or equivalent to demonstrate solvency. Please provide a statement detailing the existence of any lawsuits filed against the Firm, or by the Firm, that might result in a measurable negative financial impact on the Firm's future.
- Please provide a complete list, including contact information, of customers and/or clients the Firm provides CAMA-related software and services. Please highlight those customers that are of a similar size and complexity to Galveston CAD.
- Please provide a detailed description of your Firm's ownership, including any parent companies and/or subsidiaries, as applicable, along with the names and addresses of all principals within any of these said companies. Also include a biographical and historical sketch of the Firm detailing the dates of creation, merger, buyouts, or takeovers as applicable.

- To achieve its overall objective, the District seeks to partner with a Firm that shares common values and goals of performing the duties of property tax appraisal and seeks to advance the methodologies and theories of the industry, while at the same time striving to be a leader in IT-related solutions. Evaluation of any prospective Firm will not be limited only to technical specifications but will include other intangible assets of the Firm. Therefore, please provide a detailed internal view of the Firm, which includes mission statements, long and short-term goals, software support perspectives, software customization perspectives, software enhancement perspectives, employee staffing, and future staffing goals. Identify your vision for embracing future technology and/or enhancements, and how the Firm intends to remain competitive and on the "cutting edge" with CAMA-related software in the years to come.
- Describe in detail the Firm's ability and methodology to provide ongoing support and technical assistance, once installation and conversion is complete, including the number of employees currently in place or that might be added to provide ongoing support to the District.
- Please provide a statement as to the Firm's ability to begin full and complete implementation and conversion of this project once a contract is executed and finalized.

14. PROPOSAL SUBMISSION INSTRUCTIONS

Vendors must submit their proposals in accordance with the instructions set forth below. Failure to comply with these requirements may result in the disqualification of the proposal. All proposals and related documents must be submitted by an individual authorized to bind the vendor.

14.1 Method of Submission:
All proposals must include three (3) printed copies, and one digital version in a sealed envelope/package submitted by mail to the address provided in the contact information section below.

14.2 Format Requirements:
- Digital version must be provided in **PDF format** on a USB drive.
- All copies must be provided as a **bound hard copy**.

14.3 Number of Copies:
- **At a minimum, three (3) physical copies** must be submitted for every proposal.

14.4 Labeling Requirements:
All proposal packages must be clearly labeled as follows:
- **"RFP No. GCAD2025CAMA – [Vendor Name]"**
- This label must appear on the exterior of the envelope/package.

14.5 Submission Deadline:

Proposals must be received by GCAD no later than **January 29, 2026** at **1:00 pm. Late submissions will not be accepted**, regardless of the cause of delay, including carrier delivery issues, mail delays, or technical difficulties.

14.6 Responsibility for Delivery:

The Vendor assumes all responsibility for delivery of the proposal to the designated submission location. GCAD will not be responsible for proposals that are misdirected, delayed, or otherwise not received by the stated deadline. Vendors should allow sufficient mailing time to ensure the timely receipt of the proposal.

15. System Questionnaire

System Questionnaire

A "yes" or "no" response to all sections is required.

Instructions:

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

1. Software Application and Database Design	Yes/No	Cost to Modify
1.1. Does the vendor, within current maintenance costs, ensure legislative compliance by the bill's effective date or as soon as possible allowed by the release schedule?		
1.2. Is the application cloud-based?		
1.3. Is the application written for a dynamically scaled computing environment?		
1.4. Does the application support distributed processing server technology?		
1.5. Does the application allow for a fully redundant Windows & SQL Clustering solution to minimize downtime?		
1.6. Is the application developed for a Windows-based network environment?		
1.7. Does the application employ a Graphical User Interface for ease of use?		
1.8. Does the application have online help? If so…		
1.8.1. Is the help context-sensitive?		
1.8.2. Does it use the standard Windows "What's This?" functionality?		
1.8.3. Are there additional tools to allow direct contact with the support staff?		
1.8.4. Does the application have step-by-step "How To" developed for common functions?		
1.8.5. Does the application have a step-by-step "How To" developed for Texas tax calendar functions?		
1.8.6. Is the online help updated when functionality is added or changed?		

1.8.7. Does the system allow for HCAD-specific procedures to be added to the online help?		
1.9. Does the application use a generally available report writer for all its forms and reports?		
1.9.1. If so, can the user make edits to the forms and reports as needed?		
1.10. Can the data be exported using industry standard formats?		
1.11. Is the application installed using standard methods on their respective platforms?		
1.12. Does the vendor utilize a structured Release Deployment Plan in order to schedule deployment and protect the end users from instability?		
1.13. Are new releases automatic?		
1.14. Is the application fully compatible with most internet browsers?		
1.15. Does the application support a read-only or kiosk mode for use in the customer service lobby?		
1.16. Does the product support user API's?		
1.17. Does the product support VOIP phone system integration?		
1.17.1. Does the integration allow for accounts to be grouped and searched by caller ID?		
1.18. Is the application capable of Optical Character Recognition (OCR)?		
1.19. Does the application maintain a one-to-many relationship between the owner table and the property/parcel table? (Can an owner have multiple properties?)		
1.20. Does the application maintain a one-to-many relationship between the property/parcel table and the owner table? (Can a property have multiple owners without splitting it?)		
1.21. Does the application allow for ownership % to be applied and maintained at the land, improvement, and personal property segment level?		
1.23. Is the number of taxing entities allowed per account unlimited?		
1.24. Does the application allow for entity % to be applied at the property level? For example, a property is 50% inside city limits, and does not have to split the account.		
1.25. Does the application allow for entity % to be applied and maintained at the land, improvement and personal property segment level?		

1.26. Does the application allow for grouping properties for the purpose of apportioning exemptions? (Can an MH property be grouped with the land property or property to apply the HS exemption without combining the properties?)		
1.27. Does the application allow for grouping properties for the purpose of apportioning value (Income Valuation, Economic Units, Effective Acres, Special Appraisal Distribution)?		
1.28. Does the application allow for prorating exemptions?		
1.28.1. If so, does the property allow for multiple prorations on the same account in the same tax year?		
1.29. Does the application support storing the tax payment status from the tax office?		
1.30. Does the application maintain a complete set of appraisal history per tax year?		
1.30.1 Is this accomplished without intervention by technical support personnel?		
1.30.2. Does this include land and improvement detail appraisal information?		
1.30.3. Does this include pricing schedules by tax year?		
1.30.4. Does this also include neighborhood adjustments by tax year?		
1.30.5. Does this also include subdivision adjustments by tax year?		
1.30.6. Does this also include cost multipliers and local multipliers by tax year?		
1.30.7. Does the application allow for calculations of value to be performed on a previous year's account?		
1.31. Does the application capture a complete set of appraisal information when a property is sold?		
1.31.1. If so, does this include land and improvement detail appraisal information?		
1.31.2. Can land and improvement detail information be modified without affecting current values?		
1.31.3. Does the application allow for configurable user warnings to manage data entry affecting new value, sales, or ARB settlement offers?		
1.32. Does the application capture new value?		
1.33. Does the application capture new value upon completion of construction?		

1.34. Does the application allow for calculations of value to be performed on appraisal information captured at the time of sale?		
1.35. Does the application allow property comparisons and ratio calculations using appraisal information captured at the time of sale, in addition to the current appraisal information?		
1.36. Is the database SQL-compliant? If so...		
1.36.1. Can it be accessed using generally available ODBC drivers?		
1.37. Can it access other SQL-compliant databases, such as GIS servers?		
1.38. Is there a graphical user interface for querying the database(s)?		
1.39. Is the complete data dictionary available for querying?		
1.40. Does the application allow a user to track and report on the value status of any account?		
1.41. Does the application allow a user to reconcile multiple valuation methods to determine a final value, including cost, income, and sales values?		
1.42. Has a client experienced the total loss of access and/or visibility to an account(s)? (Example: No primary accounts)		
1.42.1. If so, could the account be retrieved or restored to the database by the vendor in less than 48 hours (about 2 days)?		
1.43. Does the system allow a one-to-many relationship between an official document (deed) table and the property/parcel table?		
1.44. Does the system maintain a chain of title?		
1.45. Does the system allow secondary documents to be recorded in parallel with the official document? (Examples: Life Estate, Heir Owner, Contract for Deed, Ground Lease, etc.)		
1.45.1. If so, does the system allow secondary parties to be listed on an account?		
1.46. Does the system maintain a person's date of birth in a separate field from an entity's date of establishment?		
1.47. Does the system maintain a person's date of death in a separate field from an entity's date of dissolution?		
1.48. Does the system recalculate values for only tax years affected by the change?		
1.49. Does the system maintain exemption and other value modifier calculations as required by Texas legislation per tax year?		

1.49.1. If so, does the system automatically adjust exemption amounts for added value or new construction?		
1.49.2. If so, does the system automatically adjust tax ceilings for added value or new construction?		
1.51. Does the system allow exemptions to be associated with a specific property owner?		
1.52. Does the system allow for an exemption type to be applicable across multiple property types?		
1.53. Does the system allow exemptions to be awarded as a percentage of appraised value?		
1.53.1. If so, does the system allow exemptions to be awarded as a percentage of land, improvement, interest, or asset?		
1.54. Does the system allow exemption amounts or percentages to vary per taxing entity?		
1.55. Does the system allow exemption amounts or percentages to vary per taxing entity per year?		
1.55.1. If so, does it require a new exemption entry each time the amount or percentage changes?		
1.56. Does the system allow exemptions or other value modifier calculations to be automatically applied based on the existing data and state laws?		
1.57. Does the system allow configurations that generate alerts and/or prevent data entry errors?		
1.58. Does the system allow flagging an account for a future inspection and a reason?		
1.59. Does the system allow flagging an account for inspection by multiple departments?		
1.60. Does the system track mailed exemption applications or other forms?		
1.61. Does the system maintain images of the received application?		
1.62. Does the system track the latest application mailed date?		
1.63. Does the system track the latest application received date?		
1.64. Does the system track late applications?		
1.65. Does the system track actions taken on applications?		

1.66. Does the system track the applicant's name for those who do not match the owner's name?		
1.67. Does the system track occupancy date?		
1.68. Does the system track income-producing Percentage?		
1.69. Does the system track the owner as Not of Record?		
1.70. Does the system track a qualifying Trust?		
1.71. Does the system track beneficiary Name(s)?		
1.72. Does the system track the beneficiary's Date of Birth?		
1.73. Does the system track cooperative Housing?		
1.74. Does the system track disability Start Date?		
1.75. Does the system track disability End Date?		
1.75.1. Does the system allow for an automatic action to be taken as of the end date?		
1.76. Does the system track veteran Disability Rating?		
1.77. Does the system track total and Permanent Disability?		
1.78. Does the system track participating Taxing Units?		
1.79. Does the system allow the user to enter future exemption start dates?		
1.80. Does the system allow the user to enter future exemption end dates?		
1.81. Does the system consider effective and termination dates and/or tax year to allow for multiple exemptions to be processed for properties?		
1.82. Does the system allow for multiple, non-overlapping exemptions to be on a property at a time?		
1.83. Can the system produce and track exemption estimates for the estimates roll within the production database?		
1.84. Does the system maintain an exemption or other value modifier change log?		
1.85. Does the system calculate and maintain appraised value limitations?		
1.86. Does the system calculate and maintain tax ceilings and freeze years?		
1.87. Does the system calculate and maintain tax ceiling transfer ratios?		

	Yes/No	Cost to Modify
1.88. Does the system allow the tax ceiling and freeze-year participation to vary by taxing entity?		

2. Mass Processing	Yes/No	Cost to Modify
2.1. Does the application perform a full system recalculate with the benchmark property quantities in 4 hours or less?		
2.2. Has the application been tested with a full system recalculation with the benchmark property quantities in 4 hours or less?		
2.3. Does the application generate 200,000 residential sales comparable grids in 2 hours or less?		
2.4. Has the system been tested generating 200,000 residential sales comparable grids in 2 hours or less?		
2.5. Does the application generate 200,000 residential equity comparable grids in 2 hours or less?		
2.6. Has the system been tested generating 200,000 residential equity grids in 2 hours or less?		
2.7. Does the application generate and print entity totals for all entities in 1 hour or less?		

3. Parcel/Account Search Information	Yes/No	Cost to Modify
3.1. Can the Parcel/Account be accessed by all of the following?		
3.1.1. Account Number?		
3.1.2. Geographic Number?		
3.1.3. Account Type (Real, Personal, Mineral, Mobile Home, Auto)?		
3.1.4. Include deleted and reference properties?		
3.1.5. By Year?		
3.1.6. Situs?		
3.1.7. Abstract/Subdivision, Block, Lot?		
3.1.8. Neighborhood Code or Description?		
3.1.9. DBA?		
3.1.10. Map ID?		
3.1.11. Building Permit Number?		

3.1.12. Mineral Lease Number?		
3.1.13. Previous ownership?		
3.1.14. Business type (NAICS)?		
3.1.15. Dealer's license number?		
3.1.16. Aircraft tail number?		
3.1.17. Owner/Taxpayer ID?		
3.1.18. Owner/Taxpayer Name?		
3.1.19. Owner/Taxpayer First Name?		
3.1.20. Owner/Taxpayer Last Name?		
3.1.21. Owner/Taxpayer Mailing Address?		
3.1.22. Previous Taxpayer Name?		
3.1.23. Agent's ID?		
3.1.24. Agent's Name?		
3.1.25. Agent's First Name?		
3.1.26. Agent's Last Name?		
3.1.27. Agent's Mailing Address?		
3.1.28. Entity?		
3.1.29. GIS tools?		
3.1.30. Year Range?		
3.1.31. Street Number Range?		
3.1.32. Block Range?		
3.1.33. Lot Range?		
3.1.34. Any Previous Taxpayer Name?		
3.1.35. Exemption Start Date?		
3.1.36. Exemption End Date?		
3.1.37. Deed Instrument Number?		
3.1.38. Deed Instrument Number Range?		

3.1.39. Deed Date Range?		
3.1.40. Phone Number?		
3.1.41. Username?		
3.1.42. Entry Date Range?		
3.1.43. Department?		
3.1.44. Exemptions?		
3.1.45. Property Use?		
3.1.46. Zoning?		
3.1.47. Value Status? (for tracking the property through the appraisal cycle)		
3.1.48. Field Assignment Group? (For mobile appraisal device)		
3.1.49. Building Permit #?		
3.1.50. UDI Properties?		
3.1.51. Deed Volume/Page/Number?		
3.1.52. Improvement Type?		
3.1.53. State Code?		
3.1.54. Map ID?		
3.1.55. SIC Code?		
3.1.56. Mobile home Serial, Title, or HUD number?		
3.1.57. Deed Volume, Page of Number?		
3.1.58. Configurable Code for Grouping Properties? (Property Group Code)		
3.1.59. ANY COMBINATION OF THE ABOVE?		
3.2. Does the system also allow for a generic/universal search using one entry box?		
3.3. Does the system have an advanced search?		
3.4. Does the system allow the use of wildcards (%, *) in the search criteria?		
3.5. Do all search results display basic data fields, including account number, situs, owner name, account status?		
3.6. Can displayed result fields be sorted, rearranged, added, or removed according to the user's preferences?		

3.7. Does the system display a message if no results are found?		
3.8. Does the system display the number of results found and the time taken to return the search results?		
3.9. Does the system have an adjustable limit for the maximum number of results returned?		

4. Property Owner Records	Yes/No	Cost to Modify
4.1. Does the application allow multiple owners per parcel/account?		
4.2. Does the system allow for additional lookup names to be entered in ownership records?		
4.3. Does the system allow for official documents to be entered out of chronological order?		
4.4. Does the system allow a user to undo a deed entry?		
4.5. Does the system allow a user to update one mailing address for multiple accounts?		
4.5.1. If so, can the user specify what accounts are updated?		
4.6. If so, are the interests and values maintained at the account level?		
4.7. Does the system support multiple addresses per taxpayer?		
4.8. If so, does the system allow the user to indicate which address is for mailing?		
4.9. Does the system support multiple phone numbers per taxpayer?		
4.10. Does the system support CASS Certification information?		
4.11. Does the system allow for document images to be scanned or attached to taxpayer records?		
4.11.1. Does the system allow for official documents to be entered out of chronological order?		
4.12. Does the system allow for the identification or flagging of International Addresses?		
4.13. Does the system provide the ability to flag returned mail?		

4.13.1. Does the system provide for the mailing address to default back to the situs address after a set number of mail returns?		
4.14. Does the system allow an owner's information (name and address) to be suppressed from the website without being confidential/suppressed from the public record?		

	Yes/No	Cost to Modify
4.15. Does the system support importing National Change of Address (NCOA) data?		
4.16. Does the system allow for the identification or flagging of "confidential" owners, such as police officers?		
4.17. Is confidential and PII stored in an encrypted format?		
4.18. Are property descriptions maintained distinctly by year?		
4.19. Does the system support 10 or more taxing entities on a single account?		
4.20. Does the system support eight or more exemptions on a single account?		
4.21. Does the system support 100 or more taxing entities?		
4.22. Does the system support 50 or more exemptions?		
4.23. Does the system have an integrated online exemption application tool?		
4.24. Can an account be inactivated or deleted? If so…		
4.24.1. Can it be recovered at a later date?		
4.24.2. Can an account be inactivated or deleted for a future date?		
4.24.3. Can a deleted account be searched?		
4.24.4. Can an account be activated or created for a future date?		
4.24.5. Does the system allow you to create or delete an account as of a specific date without changing the system's effective date?		
4.25. Does the recovery process restore the original improvement and land appraisal information?		
4.25.1. If so, is a history of permits maintained?		
4.26. Does the system support multiple Situs Addresses?		
4.27. Does the system support multiple Doing Business As (DBA)?		
4.28. Does the system support multiple email addresses?		
4.29. Does the system track agreement for the taxpayer to receive Electronic Communication?		
4.29.1. If so, does the system indicate which type of communication will be electronic? (E.g., Appraisal Notices, Tax Statements, Online Appeals)		
4.30. Does the system maintain distinct situs addresses by year?		
5. Splits and Merges	Yes/No	Cost to Modify

	Yes/No	Cost to Modify
5.1. Does the system have a GIS tool to process splits and merges?		
5.2. Does the system have a split/merge workflow process?		
5.3. Does the system support copying land segments, improvements, and images to other accounts?		
5.4. Can the user see all the history involved with all splits of a property?		
5.5. Does the system provide the ability to merge properties through the use of a Help Wizard?		
5.5.1. If so, can the user see all history involved with all property merges?		
5.6. Does the system provide the ability to mass-create new properties through the use of a Help Wizard?		
5.7. Does the system allow for certain data of BPP properties, such as situs and entities, to be linked and imported from the real property at that same location?		
5.8. Does the system provide the ability to link properties?		
5.9. Does the system provide the ability to split property through the use of a Help Wizard?		
5.9.1. If so, can the user see all the history involved with all splits of a property?		
5.9.2. If so, can the user see all history involved with all property merges?		
5.10. Does the system allow a user to undo splits or merges?		
5.11. Does the system allow splits or merges to occur out of chronological 0rder?		
5.12. Does the system allow the user to view the properties to be split in GIS?		
5.13. Does the system allow the user to view the properties to be merged in GIS?		
5.14 Does the system allow a user to join a spreadsheet/text file based on property I to mass input distinct values (i.e., situs, acreage, taxing entities etc.)?		
5.15 Does the system maintain a version history for all accounts?		
6. TIF Zone Data	Yes/No	Cost to Modify
6.1. Does the system track TIF zone data (Base Year, Expiration year, Description, or Name, Code, type, participating entities?		
6.2. Does the system track Base Market and Base Taxable value by entity?		

	Yes/No	Cost to Modify
6.3. Does the system allow for correcting the base year values?		
6.4. Does the system generate reports and letters for the related entities?		
6.5. Does the system generate summary and detail reports?		
6.6. Does the Summary report show the Base and the Current year values and increment?		
6.7. Can reports be run for specific entities?		
6.8. Are the reports user configurable, allowing adding and removing fields?		
6.9. Does the report allow showing the amount of value under litigation?		
6.10. Does the report allow showing the amount of value under ARB review?		
6.11. Does the report show certified vs non-certified values?		
6.12. Does the report show the value of new construction?		
6.13. Does the report show exempt value?		
6.14. Does the report show exempt value by exemption type?		
6.15. Does the report show a count of properties for the current year?		
6.16. Does the report show a count of properties for the prior year?		
6.17. Does the report show a count of properties for the base year?		
6.18. Does the report show a grand total of all the accounts?		
6.19. Does the report show the base year?		
6.20. Does the presence of a TIF code display on the property summary screen?		
6.21. Does the property split or plat process flag accounts with a TIF value or provide a way to distribute the base value?		
6.22. Is the system able to track changes in total base value for a TIF?		
6.23. Is the system able to display TIF properties on the GIS viewer?		
7. Corrections to the Certified Roll	Yes/No	Cost to Modify
7.1. Does the system keep certified history by year?		
7.1.1. Does the system track 10 years of certified history?		
7.2. Does the system allow for corrections, additions, or deletions to the certified roll?		

7.2.1. Does the system allow for modification of the 10 prior years?		
7.3. Does the system allow for omitted property and omitted improvement tracking for the purpose of correcting the roll?		
7.4. Does each supplemental roll only include changes made since the last supplemental roll was certified?		
7.5. Can the roll's date range be specified by the user?		
7.6. Can users continue data entry while the roll is being generated?		
7.7. Does the system have an automated process of transferring changed information to collections for bill adjustments to take place?		
7.7.1. Does the system allow for 10 years to be "transferred" to collections?		
7.8. Does the system keep full appraisal information by year? (Does the system keep a full complement of land, improvement, and business personal property information by year?)		
7.8.1. If so, can a property be "recalculated" for a prior year without affecting current values?		
7.9. Does the system print a supplemental roll listing all property involved in the corrections?		
7.9.1. Can this roll be grouped by entity?		
7.9.2. Can this roll be grouped by year?		
7.9.3. Can this roll be grouped by supplemental action? (i.e., adds, changes, deletes)		
7.9.4. Does this roll print a summary totals page indicating the gains or losses for each entity?		
7.9.5. Can this roll be reprinted on demand?		
7.9.6. Can this roll be reprinted even if subsequent rolls have been accepted?		
7.9.7. Does the system generate an Adjusted History Total after each supplement?		
7.9.8. Can multiple supplement groups be opened at the same time?		
7.10. Does the system allow for a "future supplement" to be started to allow for the 30-day notice requirement?		
8. Agent Identification	Yes/No	Cost to Modify
8.1. Can agents be created on the system (AoA or Appointment of Agent)?		

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

9.4. Does the system allow importing corrected Situs Zip Codes? (new post offices created)		
9.5. Does the system allow importing mailing address information provided from the USPS?		
9.6. Does the system allow importing owner identification information from TXDPS or a similar agency?		
9.7. Does the system allow importing death information from the Texas Department of Vital Statistics or a similar agency?		
9.8. Does the system allow importing mineral data from multiple vendors?		
9.9. Does the system allow custom imports and mapping of tabular data files?		
9.10. Does the system allow importing mortgage company records?		
9.11. Does the system include preconfigured imports of all the major appraisal vendors' standard exports?		
9.12. Do all imports from appraisal vendors capture new value?		
9.13. Do all imports from appraisal vendors capture ownership changes?		
9.14. Does the import tool generate custom change reports showing before and after values?		
9.15. Does the system allow importing collection and tax payment events?		
9.16. Does the system import exemption data from appraisal vendors?		
9.17. Does the system import abatement data from appraisal vendors?		
10. Export Information	Yes/No	Cost to Modify
10.1. Does the system allow exporting application data?		
10.2. Does the system allow exporting appraisal information?		
10.3. Does the system allow exporting CASS data?		
10.4. Does the system allow exporting Situs Address for zip code correction?		
10.5. Does the system allow for the transmittal of non-supplemented changes to the tax office(s)? (ownership changes, situs address changes, tax deferral changes, etc.)		
10.6. Does the system allow exporting ownership changes?		
10.7. Does the system allow exporting property summary data?		
10.8. Does the system allow exporting shared property data?		

	Yes/No	Cost to Modify
10.9. Does the system allow exporting sales submission data?		
10.10. Does the system allow exporting state reviewer data?		
10.11. Does the system allow truth-in-taxation data?		
10.12. Does the system allow the modification and addition of fields to existing exports?		
10.13. Does the system allow users to develop custom exports?		
10.14. Does the system allow exports to be scheduled and processed automatically?		
11. Event Tracking	Yes/No	Cost to Modify
11.1. Does the system track all system-defined events for a property, such as notice generated, protest generated, ownership transfers, etc.?		
11.2. Does the system keep an exact copy of the appraisal notice that was generated?		
11.3. Does the system allow for user-defined events?		
11.4. Does the system display in chronological order the events attached to a property?		
11.5. Does the system allow the user to see events for a property?		
11.6. Does the system allow the user to see the appraisal and collections events for a property at the same time?		
11.7. Does the system allow the user to attach any Windows objects (i.e., video, images, etc.) to an event for a property?		
12. Change Log Administration	Yes/No	Cost to Modify
12.1. Does the system allow identification of fields to be tracked when changed?		
12.2. Does the system allow viewing of all changes made to the fields being tracked?		
12.3. Does the system maintain a version history that allows users to view a property/record as of save points?		
12.4. Does the system show a before-and-after picture of the fields that change?		
12.5. Does the system track changes to records even when performed outside of the application, such as an update statement using SQL?		
12.6. Does the system allow for customizable change reports?		

	Yes/No	Cost to Modify
12.7. Does the system allow for change reports of changes by specific users?		

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

14. Appraisal Notice Automation	Yes/No	Cost to Modify
14.1. Does the system include a comprehensive 25.19 notice selection wizard?		
14.2. Can the 25.19 notice form be printed in-house?		
14.3. Can the 25.19 notice form be exported to a print file?		
14.4. Does the system include a comprehensive 25.192 notice selection wizard?		
14.5. Can the 25.192 notice form be printed in-house?		
14.6. Can the 25.192 notice form be exported to a print file?		
14.7. Does the system include a comprehensive 25.193 notice selection wizard?		
14.8. Can the 25.193 notice form be printed in-house?		
14.9. Can the 25.193 notice form be exported to a print file?		
14.10. Does the system allow for notices to be mailed by property type (i.e., Real property go first -vs- Personal Property?		
14.11. Does the system allow for multi-property notices?		
14.12. Does the system allow printing notices for owners, agents, or both?		

14.13. Does the system provide the ability to code a property that will FORCE a notice to should the Appraisal Notice be mailed to this property during the Appraisal Notice selection process?		
14.14. Does the system provide the ability to code a property that will EXCLUDE the property from being selected for notification during the May Notice selection process?		
14.15. Does the system create an event indicating that a notice was mailed to the property owner or agent?		
14.16. Does the system automatically store an image of the appraisal notice that was mailed to the property owner or the agent?		
14.16.1. Can the stored image then be reprinted?		
14.17. Does the system record "ARB values" system-wide at the time the appraisal notices are printed to serve as a reference point for comparison during the protest period?		
14.18. Does the system allow for custom queries to be used to selectively code properties to FORCE a notice to be mailed to this property during the Appraisal Notice selection process?		
14.19. Does the system allow you to work in a Future Year layer while in the protest season?		
14.20. Does the system allow all accounts to be moved to the future year even before certification?		
14.21. Does the system allow Notices to be published electronically? (Where the taxpayer or Agent can view the Notice online.		
14.22. Does the system allow Notices to be published to the Property Search website?		
14.23. Does the system have an integrated email notice module or Microsoft 365 integration?		
15. Certified Appraisal Roll Automation	Yes/No	Cost to Modify
15.1. Does the system allow for certifying the roll in less than 5 hours?		
15.2. Does the system allow for generating and tracking a certified estimate of the roll?		
15.3. Does the system print certified totals by entity with a separate total for "Under ARB Review" items?		
15.4. Can the appraisal roll be printed in-house with duplex capability on laser printers?		

15.5. Can the appraisal roll be exported to an ASCII file for off-site printing?		
15.6. Can the appraisal roll be exported to a fixed-length file for taxing jurisdictions?		
15.7. Can the New Year creation and commencement of work begin immediately after certification?		
15.8. Does the system print the State Reports in Laser Forms?		
15.9. Does the system export to the EDS format for submission to the state?		
16. Appraisal Review Board Processing (ARB)	Yes/No	Cost to Modify
16.1. Does the system have an Appraisal Review Board package?		
16.2. Does the system allow for multiple protest reasons under a single protest?		
16.3. Does the system allow for multiple protesters under a single protest?		
16.4. Does the system allow for multiple tax years under a single protest?		
16.5. Does the ARB package have a barcode or QR code for scanning?		
16.6. Does the system allow creating protests through a wizard?		
16.7. Does the system allow creating protests from an Excel file?		
16.8. Does the ARB package provide scheduling tools?		
16.9. Can the user search by Property ID?		
16.10. Can the user search by Case ID?		
16.11. Can the user search by hearing date?		
16.12. Can the user search by appraiser?		
16.13. Can the user search by Status?		
16.14. Can the user search by Inquiry type?		
16.15. Can the user search by Date range?		
16.16. Can the user search by ARB Panel?		
16.17. Can the user search by status?		
16.18. Can the user search by Agent?		
16.19. Can the user update protest and hearing characteristics for multiple records from the search results?		

16.20. Does it automatically produce all the Comptroller-required reports and surveys?		
16.21. Does the system automatically send all required text, email reminders, and notices for hearings?		
16.22. If a 25.25d motion is being submitted on an account that has already had a S&W or a Chapter 41 value hearing with a determination, will it record the submission, and update to the appropriate case status?		
16.23. Can it auto validate and record, upon the filing of a 25.25 motion or 41.411, account-specific year, year-specific, delinquency date, tax payment date(s), and amount(s)?		
16.24. Can it determine if the 25.25 motion is timely and code the case appropriately?		
16.25. Can it calculate/estimate the undisputed amount of taxes based on information provided on the motion form?		
16.26. Can I t determine whether the undisputed amount of taxes has been paid on time and code accounts appropriately?		
16.27. Prior to the scheduled hearing date, if the undisputed portion of taxes has not been paid timely, can it auto-notify the filer with correspondence designed to inform them of the legal requirements necessary to proceed with a hearing?		
16.28.		
16.28.1. Will it auto-notify the filing party on all extraneous cases that the account has been closed by the authorized party?		
16.29. If multiple parties submit protests for the same grounds and the account has already been closed via JM, S&W or hearing, by the authorized party, will it record the submissions, create the cases, update cases with the correct closed case status and auto notify all filing parties, as cases are being created, that they will not be scheduled due to previous closure by authorized party?		
16.30. Is the data in the protest filing screen/wizard in the same order as on the Notice of Protest?		
16.31. Does the system record the type of hearing requested (in-person, affidavit, telephone, video conference)?		
16.32. Can the cases be filtered and sorted by requested hearing type?		
16.33. Can the hearing type be changed/updated in mass?		
16.34. If errors (ex, wrong year, wrong agent number) occur when ARB cases are created, can the errors be corrected?		

16.34.1. Can errors be corrected in mass?		
16.35. Can a report be generated for all accounts ready for an Agreed Order?		
16.36. Can a report be generated for all accounts ready for a Final Order?		
16.37. Can Orders be generated in mass by Agent number?		
16.38. At the account level, does the system track the call-in registration time for a telephone hearing?		
16.39. Does the system track when the telephone case is put into the panel room?		
16.40. Does the system track when the hearing starts and stops?		
16.41. At the account level, does the system track when the property owner/agent enters the waiting room for a videoconference hearing?		
16.42. Does the system track disconnections/interruptions?		
16.43. Does the system track on whose end the disconnection/interruptions occurred?		
16.44. Does the system track if an Affidavit/Unsworn Declaration has been uploaded to an account?		
16.45. Does the ARB package keep track of all letters printed?		
16.46. Does the ARB package allow for multiple properties that are part of the same economic unit on one protest?		
16.47. Does the ARB package allow for multiple properties that are part of the same undivided interest on one protest?		
16.48. Does the ARB package allow for multiple properties that are part of the same effective acreage group on one protest?		
16.49. Does the ARB package allow for multiple properties that are part of the same homestead group on one protest?		
16.50. Does the ARB package allow for scheduling for appraisers and ARB hearings?		
16.51. Does the ARB package allow panel members to be assigned to a panel?		
16.52. Does the ARB package allow for a panel room to be assigned to a user?		
16.53. Does the ARB package allow scheduling for off-site locations?		
16.54. Does the ARB package keep the minutes of the meetings, the voting results, and motions?		
16.55. Can the user print a schedule for Appraiser meetings?		

16.56. Can the user print a schedule for the ARB meetings?		
16.57. Are all codes user-defined and maintainable?		
16.58. Is the ARB data kept by year indefinitely?		
16.59. Does the ARB package capture digital audio (MP3 format) directly to the ARB record?		
16.60. Does the ARB package support video conferencing?		
16.61. Does the ARB package capture video directly to the ARB record?		
16.62. Does the ARB package automatically generate a sales comp grid based on pre-defined parameters?		
16.63. Does this sales comp grid also have automatic adjustments of sales comp to subject to come up with an indicated value?		
16.64. Does the ARB package allow for a paperless ARB presentation showing a protest information, sales comp grid, GIS comp grid, appraisal card, etc.?		
16.65. Does the ARB package allow for the configuration of an evidence packet specific to property or protest characteristics?		
16.65.1. If so, can the evidence packet be created for multiple protests at a time?		
16.65.2. Can the ARB package determine which evidence to generate for each protest?		
16.66. Does the ARB package allow for a paperless Taxpayer presentation?		
16.66.1. If so, can the Taxpayer presentation be accessed from the same record where the ARB presentation is accessed?		
16.67. Can the user quickly review prior year and current year property data and values side-by-side, along with the percentage of change by year for hearing support?		
16.68. Does the system provide real-time updates on the hearing schedule?		
16.69. Does the system allow staff to page for assistance during a hearing?		
16.70. Does the system allow non-value-related protest determinations to be entered without changes to the notified or final market values?		
16.71. Does the system support a tax payment status import?		
16.72. Does the system support a tax office account live link from within the protest?		

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

17.12. Does the system allow The District to notify the taxpayer of status or changes to the online protest?		
17.12.1. If so, is text message notification an option?		
17.13. Does the system allow non-value-related settlements or withdrawals to be entered without changes to the notified values, final market values, or value-related protests or settlements?		
17.14. Does the system allow Agents to file a protest online?		
17.15. Does the system allow the District's evidence to be published online for the Agent?		
17.16. Does the system allow the Agent to submit evidence online?		
17.17. If so, is the evidence loaded into the system without user intervention?		
17.17.1. Are there security parameters in place to protect The District from large or corrupt uploaded files?		
17.17.2. Does the system allow the Agent to schedule a hearing online from the District's configured available dates?		
17.17.3. Does the system allow the Agent to schedule a hearing by location?		
17.17.4. Does the system allow an Agent to reschedule a hearing online?		
17.17.5. Does the system allow an Agent to withdraw a protest online?		
17.18. Does the system allow The District to offer a settlement online to an Agent?		
17.19. Does the system allow an Agent to accept or reject an offer online?		
17.20. If so, is the Agent decision loaded into the system without user intervention?		
17.20.1. Does the system allow The District to notify the Agent of status or changes to the online protest?		
18. Lawsuit/Arbitration Tracking	Yes/No	Cost to Modify
18.1. Does the system have a way to track lawsuits?		
18.2. Does the system display lawsuit data in a condensed format so statuses, changes, filing history, and account values can all be summarized on a single screen?		
18.2.1. Can changes be made from this screen?		
18.3. Does the system allow adding accounts in mass based on new petitions?		

18.4. Does the system have an evidence tool for lawsuits?		
18.4.1. Does this tool have similar functionality to the ARB evidence tool?		
18.4.2. Does this tool allow for importing the evidence from the ARB hearing?		
18.5. Does the system track court information?		
18.6. Does the system track lawsuit cost information?		
18.7. Does the system have a way to track jurisdictional flaws?		
18.8. Does the system have a way to track protest reason/type?		
18.9. Does the system have a way to track the plaintiff's name?		
18.10. Does the system have a way to track the cause number?		
18.11. Does the system have a way to track the date filed, date served, final delivered date, amended date, and original answer filed date?		
18.12. Does the system track the defendant's attorney and the plaintiff's attorney?		
18.13. Does the system track notice value and ARB value?		
18.14. Does the system track the tax status and date paid?		
18.15. Does the system track the agreed value and approved agreed judgment dates?		
18.16. Does the system track the disposition status, conformed date, and closed date?		
18.17. Does the system track the category granted for the current and prior years?		
18.18. Does the system track the total litigated value for the current and prior years?		
18.19. Does the system track the final value and net difference for the current and prior year?		
18.20. Does the system have a tax entity notified field?		
18.21. Does the system have a problem/comments field?		
18.22. Does the system track letters for flagged/closed accounts?		
18.23. Does the system generate a letter to the entities for flagged accounts?		
18.24. Does the system store the beginning and ending values for the lawsuit?		

18.25. Does the system show the value lost by the entity?		
18.26. Does the system allow images to be attached to the lawsuit?		
18.27. Does the system have letter processing for lawsuits?		
18.28. Does the system automatically generate letters based on specific events?		
18.29. Does the system have a way to track arbitration cases?		
18.30. Does the system have a way to track arbitration case numbers?		
18.31. Does the system have a way to track the individual's (owner and/or agent) name that filed the arbitration case and their contact information?		
18.32. Does the system have a way to track the arbitration value request?		
18.33. Does the system have a way to track the arbitration fee that was paid?		
18.34. Does the system have a way to track comptroller arbitration acceptance, denial, and withdrawal letters and dates?		
18.35. Does the system have a way to track and calculate an arbitration 45-day period settlement window deadline from the date of the comptroller's acceptance letter?		
18.36. Does the system have a way to track tax status with date paid?		
18.37. Does the system have a way to track assigned arbitration and arbitrator information (name, mailing address, phone number, e-mail address)?		
18.38. Does the system have a way to track arbitration evidence deadlines, hearing dates, times, and hearing type (teleconference or in person, and informals in person, then the location?		
18.39. Does the system have a way to generate arbitration evidence cover letters using account and arbitrator information?		
18.40. Does the system track the arbitrator's contact information?		
18.41. Does the system allow for different owner contact info to be used for the Arbitration vs all other communications?		
18.42. Does the system show arbitration information?		
18.43. Can a user search for arbitration records by property type?		
18.43.1. Property Designation?		
18.43.2. Property Use?		
18.44. Does the system track value changes?		

	Yes/No	Cost to Modify
18.45. Does the system have letter processing for arbitration?		
18.46. Does the system have an evidence tool for arbitrations?		
18.46.1. Does the system allow for the configuration of a standard evidence packet for arbitration, to meet USPAP appraisal report guidelines?		
18.46.2. Does this tool have similar functionality to the ARB evidence tool		
18.46.3. Does this tool allow for importing the evidence from the ARB hearing?		
18.47. Does the system allow images for lawsuits and arbitrations?		

19. Inquiry Tracking	Yes/No	Cost to Modify
19.1. Does the system have a way to track general inquiries from property owners or inquiries?		
19.2. Are the inquiries stored by year in chronological order?		
19.3. Can these inquiries be scheduled by the appraiser?		
19.4. Can these inquiries have the status changed in mass?		
19.5. Does the system store the beginning value and the ending value for the inquiry?		
19.6. Does the system allow creating protests through a wizard?		
19.7. Does the system use an automated letter processing system to print personalized form letters to the property owner or agent?		
19.8. Does the system automatically save an image of any letter mailed to the property owner or agent?		
19.9. Does the system support letter processing "templates" that allow for the routing of letters and forms to specific printers in the office?		
19.10. Does the system track events related to a particular inquiry?		
19.11. Does the system allow for any windows object be attached to an inquiry event? Windows objects such as video clips, audio recordings, etc.?		
19.12. Does the system track a change log associated with the inquiry tracking system?		
19.13. Does the system allow for document images to be scanned or attached to an inquiry record?		
19.14. Is the system able to automatically generate a sales comp grid with automatic adjustments and weighted to the subject's characteristics?		

	Yes/No	Cost to Modify
19.15. Is the system able to automatically generate an equity comp grid with automatic adjustments and weighted to the subject's characteristics?		
19.16. Does the system allow for a search for inquiry records?		
19.17. Can this search be customized by date, appraiser, status, sign-in time, etc?		
19.18. Does this search allow configuration to automatically refresh at a pre-defined interval for monitoring purposes?		
19.19. Does the system allow search by inquiry reason?		
19.20. Does the system have any reports associated with the inquiry tracking system?		
19.21. Does the system import or link notes and images from the inquiry into the protest?		

20. Configurable Reports	Yes/No	Cost to Modify
20.1. Does the application have a way to configure a generic query, stored procedure, or view and display the results in a columnar window within the application?		
20.1.1. Can these be scheduled to run at a future time?		
20.2. Does this allow for user assignment configuration?		
20.3. Does this allow for reports on arbitrations?		
20.4. Does this allow for reports on Lawsuits?		
20.5. Does this allow for reports on properties valued with Marshall & Swift?		
20.6. Does this allow for automatic time-interval refresh configuration?		
20.7. Does this allow for mass update of accounts?		

21. Letter and Forms Processing	Yes/No	Cost to Modify
21.1. Does the system allow for customization of 25.19 notices?		
21.2. Does the system have an integrated method of producing mail-merge type letters to property owners, agents, entities, mortgage companies, and attorneys?		
21.3. Does this letter processing system utilize an industry-standard word processor such as as Microsoft Word?		
21.4. Can the mail-merge function be called from within the appraisal application?		

21.5. Does the letter processing system display all available fields that can be used for mail-merge features?		
21.6. Does the letter processing system allow the property's main image to be included in the mail-merge function?		
21.7. Does the letter processing system automatically save an image of the document that is printed or mailed to the property owner, agent, entity, mortgage company, or attorney?		
21.8. Does the letter processing system allow for custom fields to be entered during the creation of each letter? (flex-fields)		
21.9. Does the system have an integrated forms processing system that will automatically identify the document being scanned using a barcode and assign it to the bar-coded account?		
21.10. Does this form processing system identify the business personal property rendition form?		
21.10.1. If so, does the process allow the rendition data to be entered when scanned?		
21.10.2. Is there an option to capture the rendition image and complete data entry later?		
21.11. Does this form processing system identify the homestead exemption application form?		
21.12. Does this form processing system identify the Notice of Protest form?		
21.13. Does the forms processing system identify images as Protest Evidence or Letters?		
21.14. Does the system assign template IDs to all forms and letters?		
21.15. Does the system assign and track versioning of letter and form templates?		
21.16. Does the system preserve the formatting of previously used templates?		
21.17. Can the system track, maintain, and automatically archive letters or forms in accordance with specific state and/or HCAD record retention and record disposition rules?		
21.18. Does the system allow for the creation of PDF fillable forms?		
21.19. Does the system allow for forms to be digitally signed by the user and/or property owner?		
21.20. Can the system generate certified mail numbers?		
21.21. Can the system generate mail tracking numbers for standard mail?		

	Yes/No	Cost to Modify
21.22. Can the system be configured to automatically generate and mail a specific letter or form based on changes made by a user?		
21.23. Does the system allow for a one-to-many relationship between the letter and the exemptions?		
21.24. Does the system allow for a one-to-many relationship between the letter and the affected tax years?		
21.25. Does the system allow the user to select from a list of canned responses?		
21.26. Does the system allow the user to override the mailing address of record for one-off mailings?		
21.27. Can letters or forms be generated in mass without exporting data to an external spreadsheet or text file?		
22. Mass Maintenance and Quick Entry System	Yes/No	Cost to Modify
22.1. Does the system have a separate entry system for fast data entry of information as processed by data entry operators without the use of the mouse?		
22.2. Does this data entry system allow for function keys to be, assigned to repetitive functions?		
22.3. Does the system allow for function key assignment to vary per user?		
22.4. Does the system have a separate mass maintenance system for data entry of information in mass using queries or pre-defined parameters such as subdivision code, geo number ranges, etc?		
22.5. Can a change done in mass be rolled back (undone) for the group of properties affected?		
22.6. Does the system have the means to mass update entities?		
22.7. Can notes be added in mass?		
22.8. Can assessment statuses be added or updated in mass to prevent reporting to the roll or inclusion on a notice data pull?		
22.9. Can the fields that are available for mass updates be limited by user rights or groups?		
22.10. Does the system have the means to mass update agent information?		
22.11. Does the system support industry standard hot keys and shortcuts		
23. Account Image Module	Yes/No	Cost to Modify

23.1. Does the system have an integrated Imaging system?		
23.2. Does the system support JPG saving common files to accounts?		
23.3. Does the system support TIFF saving common files to accounts?		
23.4. Does the system support PDF saving common files to accounts?		
23.5. Does the system support MSG saving common files to accounts?		
23.6. Does the system support saving common Microsoft Office file types to accounts?		
23.7. Does the system allow a primary image to be selected for the account?		
23.8. Does the system allow the primary image to be year-specific?		
23.9. Does the system allow document annotation, including notes, highlights, shapes, arrows, etc.?		
23.10. Does the system allow for redaction of sensitive or protected information?		
23.10.1. If so, is the redaction automated?		
23.10.2. If so, are the redactions retained when printing, downloading, or exporting the document?		
23.10.3. Does the system allow provide for the redaction of native documents?		
23.11. Does the system allow for a new image to initiate a workflow process for associated accounts?		
23.12. Does the system have a hierarchy to organize images?		
23.12.1. Does the hierarchy support organization by tax year?		
23.12.2. Does the hierarchy support organization by appraisal method?		
23.12.3. Does the hierarchy support organization by confidentiality?		
23.13. Does the system have encryption for confidential document types?		
24. Real Property Valuation	Yes/No	Cost to Modify
24.1. Does the application maintain totally separate appraisal information, including related schedules and valuation data by tax year?		
24.2. Are user-defined schedules used to value?		
24.2.1. If so, are all schedules completely user-maintainable?		
24.2.2. Are the schedules maintained by year?		

24.3. Are improvement features user-definable? (i.e. interior, exterior, fireplace, etc)		
24.3.1. If so, is the number of user-definable features unlimited?		
24.4. Are the user-definable features used to effect value?		
24.5. Does the application allow valuation using GIM's and EGIM's?		
24.6. Does the application allow for a loaded cap rate?		
24.7. Does the application allow allocation of value to different models for mixed-use properties?		
24.8. Does the application apply income or sales models in mass by property type or classification?		
24.9. Does the application perform regression analysis?		
24.10. Does the system allow for overrides of modeled values?		
24.11. Does the system value land by models and tables?		
24.12. Can the land value method be copied to all accounts in an economic unit?		
24.13. Can portions of land be coded and valued as excess or surplus land?		
24.14. Does the system have a reappraisal workflow with statistics by property type and staff member?		
24.15. Can the system generate ratio studies and reports at any time?		
24.16. Does the application allow the following units of measurement to be used to value:		
24.16.1. Square footage?		
24.16.2. Acreage?		
24.16.3. Front footage?		
24.16.4. Lot depth?		
24.16.5. Length/width?		
24.16.6. Wall Height?		
24.16.7. Area Perimeter?		
24.16.8. Percentage of main area value?		
24.16.9. Percentage of main area dollars per square foot?		

24.16.10. User-Definable Features?		
24.16.11. Flat Value Pricing?		
24.16.12. Percentage of entity?		
24.16.13. Percent Finish-out?		
24.16.14. Per leasable unit?		
24.17. Does the sketch tool allow drawing by angle and distance?		
24.18. Does the sketch tool flip and rotate sketches?		
24.19. Can the sketch tool import and scale building plans so they can be drawn over the top of?		
24.20. Does the sketch tool allow for overlay on GIS and aerial imagery?		
24.21. Does the sketch tool allow for a segment of a polygon to be an arc or curve?		
24.22. Does the application allow for an unlimited number of land and improvement adjustments?		
24.22.1.1. If so, are the adjustments code-driven?		
24.22.2. Can the adjustments be identified as percentage or value adjustments?		
24.22.3. Can a description be saved describing each adjustment?		
24.23. Does the application allow mass value modifications by all of the following means:		
24.23.1. Neighborhood?		
24.23.2. Property type?		
24.23.3. Subdivision?		
24.23.4. Cost Multiplier?		
24.23.5. Local Multiplier?		
24.23.6. If so, will changing the value of any of the above mass modifiers flag the associated properties automatically for mass recalculation without user intervention?		
24.24. Does the system support properties where portions are homestead, on-homestead, and agricultural special appraisal on a single account?		

	Yes/No	Cost to Modify
24.25. Does the system allow specific items to be exempt at the detail/feature level, such as solar panels on homes? (This should not be a subtraction of their value at the end, but a removal from the taxable value to prevent distortion of HS caps)		
24.26. Does the system support the Income Approach to valuation?		
24.26.1. If so, can a user capture and query actual data in the system?		
24.26.2. Can the user build and track a settlement offer using all valuation methods, including DCF, Schedule, Pro Forma, and actual rent data?		
24.26.3. Can the user store a Base Cap rate and account for taxes with the rate using multiple options?		
24.26.4. Can the user save multiple income models and select the most fitting model for the current year's valuation?		
24.27. Does the system automatically calculate and/or validate unit conversion?		
24.28. Does the system support Marshall & Swift for commercial properties?		
24.29. Does the system support a process to review remodeled properties and adjust condition characteristics for valuation?		
25. Personal Property Valuation	Yes/No	Cost to Modify
25.1. Does the system allow BPP accounts to be linked to the real property account?		
25.2. Can the real property account be found from the BPP account?		
25.3. Does the real property account display a list of BPP accounts at that location?		
25.4. Does the system allow for multiple personal property segments (i.e., inventory, furniture & fixtures, etc.) on a personal property account?		
25.5. Does the system allow for unlimited valuation methods using state-defined schedules?		
25.6. Does the system allow for user-defined local schedules?		
25.7. Does the system allow for unlimited years of rendered information?		
25.8. Does the system allow for the value to be assigned based on a selection of multiple values?		
25.8.1. For instance: unlimited state-defined or user-defined schedules, prior year value, rendered value, etc.?		
25.9. Does the system allow the user to define codes?		

25.10. Does the system allow for the application of depreciation schedules?		
25.11. Does the system allow for the application of cost index schedules?		
25.12. Does the system allow the user to define quality and density on a personal property segment?		
25.13. Does the system allow the user to define the value of a segment that is considered special inventory?		
25.14. Does the system allow tracking monthly sales dollars of special inventory property?		
25.15. Does the system allow tracking the monthly sales volume of special inventory property?		
25.16. Does the system allow tracking detailed vehicle information of special inventory property?		
25.17. Does the system report dealers who have not filed their information by the user-specified date?		
25.18. Will the system be able to create mass reports from the entry levels above by entity, field area, or business type?		
25.19. Does the system allow for BPP parcels to be updated and/or created remotely with a cellular connection directly into the CAMA system?		
25.20. Does the system allow for new BPP parcels to be created remotely without a cellular connection via external application (excel template)?		
25.21. Does the system allow quick access to BPP images and documents by tax year at the account level?		
25.22. Does the system allow the ability to read and populate rendered data from PDF (HCAD rendition or state form) to the CAMA system?		
25.23. Does the system allow for BPP account to be saved in whole (without saving after each entry) before going to another page or session in the CAMA system?		
25.24. Does the system have the ability for more than one person to access an account simultaneously?		
25.25. Does the system have a prompt response time between screens and updating of data fields?		
25.26. Will the system be able to recognize entity codes by the situs address automatically and catch errors on entity codes that do not matching the situs?		

	Yes/No	Cost to Modify
25.27. Does the system allow for staff to create a BPP account using a customized format to resemble an aircraft tail number, mineral lease number, Var-X DBA name, or dealer license?		
25.28. Does the system allow appraisal calculation according to tax code section 21.03? 21.05 and section 21.09 (interstate allocation)?		
25.29. Does the system allow appraisal calculation according to tax code section 11.251 (freeport exemption)?		
25.30. Does the system allow appraisal calculation according to tax code section 11.31 (pollution control exemption)?		
25.31. Does the system allow for the addition of late penalties according to tax code sections 11 and 21 (late filings)?		
25.32. Does the system allow the acknowledgment of September 1 appraisal designation?		
25.33. Does the system allow appraisal calculation according to tax code section 11.36 (medical/biomedical exemption)?		
25.34. Does the system allow appraisal value exception according to tax code section 11.145 (value less than $2,500)?		
25.35. Does the system allow appraisal calculation according to tax code section 11.252 (personal use leased vehicle exemption)?		
25.36. Does the system allow appraisal calculation according to tax code section 11.254 (mixed-use vehicle exemption)?		
25.37. Does the system allow appraisal calculation via cost and application of depreciation schedules per asset on various location assets?		
25.38. Does the system report dealers who had fewer than five units sold in a given year?		
25.39. Does the system provide an asset management system for easy update of assets?		
25.40. Does the system support the concept of "sub-segments" where multiple assets of Can the same type be grouped together, and the value be rolled up to the segment level?		
25.41. Does the system allow for a rolled-up value to be overridden by the user?		
25.42. Does the system allow for renditions to be submitted online?		
25.43. Does the online rendition allow for prepopulating with the prior year's assets?		
26. Sales Analysis	Yes/No	Cost to Modify

26.1. Does the application provide for the retention of sales history?		
26.1.1. Does the application provide for the retention of 30 sales records per property?		
26.2. Are these instruments displayed in chronological order?		
26.3. Does the application provide for a way to add sales that are outside of the county?		
26.4. Does the system allow instruments recorded without affecting the official chain of title?		
26.5. Does the system allow for confidentiality of the sale separate from the property owner?		
26.6. Does the application allow for multiple sales to be recorded on one account?		
26.7. Does the application allow for multiple properties within one sale record?		
26.7.1. If so, does it combine the market values of properties before comparing to sale price?		
26.8. Does the application allow for land-only and improvement-only indicators on sale records?		
26.8.1. If so, does it only use the value indicated when comparing to the sale price?		
26.9. Does the system allow the land size indicated in the sale to be maintained separately from the recorded land size?		
26.10. Does the system allow land sales to be tracked and used as comps even after splits and new construction have occurred on the original property?		
26.11. Does the system allow multiple separate deed transactions to be used to generate a sale entry for a multi-property/multi-owner transaction? (such as an estate sale)		
26.12. Does the system link and track mineral interests with real property sales?		
26.13. Does the system have a module for BPP sales tracking?		
26.14. Does the system link and track BPP that is part of a sale?		
26.15. Is sales financing information stored with sales records?		
26.16. Can the system record multiple confirmations?		
26.17. Can the sale be flagged as confidential?		
26.18. Can comparable sales be extracted using user-definable criteria?		

26.19. Can comparable sales analysis use characteristics as of the time of sale versus current property characteristics?		
26.20. Are histograms and scatter diagrams available on the sales history?		
26.21. Are all of the following statistics reported on comparable sales in the application:		
26.21.1. Mean?		
26.21.2. Median?		
26.21.3. Variance?		
26.21.4. Standard Deviation		
26.21.5. Coefficient of Dispersion?		
26.21.6. Sales ratio of the property?		
27. Building Permits	Yes/No	Cost to Modify
27.1. Does the system support building permits?		
27.2. Does the system allow for a building permit to initiate a workflow process for associated accounts?		
27.3. Does the system allow viewing of building permits by GIS?		
27.4. Can permits be located by Permit Number?		
27.5. Can permits be located by Permit Type?		
27.6. Can permits be located by the Appraiser Assigned?		
27.7. Can permits be located by the Property Owner?		
27.8. Can permits be located by Property ID?		
27.9. Can permits be located by Situs?		
27.10. Can a report be printed of building permits?		
27.11. Can a report be printed for specified building permits?		
27.12. Can permits be coded as active or inactive?		
27.13. Can permits be coded with multiple properties?		
27.14. Do permits have a date worked?		
27.15. Do permits have a date completed?		

	Yes/No	Cost to Modify
27.16. Do permits have a percent complete?		
27.17. Can permits be imported from other file types?		
28. Rollbacks	Yes/No	Cost to Modify
28.1. Does the system provide a quick, easy, user-friendly process for adding AG rollbacks?		
28.2. Does the system do all calculations automatically for all types of AG rollbacks?		
28.3. Does the system allow multiple rollbacks on a property at a time?		
28.4. Does the system allow multiple properties to be processed as a single rollback?		
28.5. Does the system allow for multiple owners to be part of a rollback group?		
28.6. Does the system allow for an account to have an absolute exemption in lieu of a rollback?		
28.7. Does the system allow for automatically generating letters for a rollback?		
28.8. Does the system import rollback data, letters, and worksheets into ARB when rollbacks are protested?		
28.9. Does the system provide a calculation worksheet to be given to the taxpayer?		
29. Comparable Sales & Comparable Property	Yes/No	Cost to Modify
29.1. Does the system allow for comparable sales to be searched for? If so, do the criteria include the following?		
29.1.1. Can comparable sales be located by a distance radius?		
29.1.2. Can comparable sales be located by Region Code?		
29.1.3. Can comparable sales be located by Abstract or Subdivision Code?		
29.1.4. Can comparable sales be located by Neighborhood Code?		
29.1.5. Can comparable sales be located by Subset Code?		
29.1.6. Can comparable sales be located by Map ID?		
29.1.7. Can comparable sales be located by School Code?		
29.1.8. Can comparable sales be located by City Code?		
29.1.9. Can comparable sales be located by situs?		

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

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

	Yes/No	Cost to Modify
31.2. Does the system automatically adjust each individual equity component in relation to the subject property?		
31.3. Does the system adjust for the Land Market Difference between the subject and equity comp?		
31.4. Does the system adjust for the Effective Year Built Difference between the subject and equity comp?		
31.5. Does the system adjust for the Living Area Difference between the subject and equity comp?		
31.6. Does the system adjust for each improvement detail segment difference?		
31.7. Does the system adjust for Plumbing differences between the subject and equity comp?		
31.8. Does the system adjust for Fireplace differences between subject and equity comp?		
31.9. Does the system adjust for the Number of Bedrooms between the subject and equity comp?		
31.10. Does the system show the Indicated Value for the subject based on the equity comps listed?		
31.11. Does the system show the Mean & Median for the subject indicated value?		
31.12. Does the system show the Digital Picture associated with the subject and each equity comp?		
31.13. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e., ARB Meetings)?		
31.14. Does the system automatically allow for the viewing of such an equity comp grid geographically using GIS coverages?		
32. Comparable Sales Grid with Automatic Adjustments	Yes/No	Cost to Modify
32.1. Does the system automatically generate a comparable sales grid weighted to the characteristics of the subject?		
32.2. Does the system allow generation of a comp grid for properties valued on income?		
32.3. Does the system allow comparison of property characteristics at the time of sale versus current property characteristics?		
32.4. Does the system automatically adjust each individual comp sale component in relation to the subject property?		

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

	Yes/No	Cost to Modify
33.6. Does the system adjust for the Living Area Difference between the subject and equity comp?		
33.7. Does the system adjust for each improvement detail segment difference?		
33.8. Does the system adjust for Plumbing differences between the subject and equity comp?		
33.9. Does the system adjust for Fireplace differences between subject and equity comp?		
33.10. Does the system adjust for the Number of Bedrooms between the subject and equity comp?		
33.11. Does the system show the Indicated Value for the subject based on the equity comps listed?		
33.12. Does the system show the Mean & Median for the subject indicated value?		
33.13. Does the system show the Digital Picture associated with the subject and each equity comp?		
33.14. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e., ARB Meetings)?		
33.15. Does the system automatically allow for the viewing of such an equity comp grid geographically using GIS coverages?		
34. Profiling	Yes/No	Cost to Modify
34.1. Does the system allow for profiling of Appraisal and sales information based on appraisal vs sale ratios?		
34.2. Does the system allow profiling with characteristics at the time of sale versus current property characteristics?		
34.3. By Neighborhood?		
34.4. By Abstract/Subdivision Code?		
34.5. By Region?		
34.6. By Subset?		
34.7. By Query?		
34.8. Does the profile report provide the following statistical functions:		
34.8.1. Lows and highs?		
34.8.2. Mean?		

34.8.3. Median?		
34.8.4. Averages?		
34.8.5. Coefficient of Dispersion?		
34.8.6. Coefficient of Variance?		
34.8.7. Gross Rent Multipliers?		
34.8.8. Gross Income Multipliers?		
34.8.9. Class Breakdown?		
34.8.10. Plot sales ratios on a graph?		
34.9. Does the system provide Neighborhood Calibration?		
34.10. Provide statistics by overall, improved, and vacant?		
34.11. Does the profiling process for one neighborhood take less than 1 minute to complete?		
34.12. Does the application allow you to 'link' profiles?		
35. GIS Connectivity	Yes/No	Cost to Modify
35.1. Does the system support an integrated live connection to a GIS System?		
35.2. Does the system support an integrated live connection to ESRI online?		
35.3. Does the system allow for GIS to be viewed from within the application?		
35.4. Can year-specific data be displayed in the GIS front-end?		
35.4.1. Does year-specific data pull from the system?		
35.5. Does the system allow a default map template to be created for users? (All users view the map configuration upon accessing GIS.)		
35.5.1. Can a user save a specific map configuration for their responsibilities, where the default map view for the system is not obstructed? (The user can create and modify the data and layers in the map view accessed from their login.)		
35.5.2. Is map configuration limited by user rights?		
35.6. Does the user have control over the GIS files to be viewed?		
35.7. Can a user have panoramic capabilities in GIS?		
35.8. Does the GIS tool utilize shortcut keys for zoom?		

35.9. Does the GIS tool utilize shortcut keys for pan?		
35.10. Does the GIS tool utilize shortcut keys for select/unselect?		
35.11. Does the GIS front-end allow multiple tools for zooming within the map?		
35.11.1. Zoom tool?		
35.11.2. Mouse scroll?		
35.11.3. Mouse clicks?		
35.12. Can a user print a map?		
35.12.1. If so, can the user configure the map format and add text for print output?		
35.13. Can GIS display attribute data on a map?		
35.14. Is attribute data viewed controlled by user rights?		
35.15. Can the user control the display of attribute labels in the GIS front-end?		
35.16. Can the user access different properties from GIS?		
35.17. Can the user search for properties within GIS? If so, by:		
35.17.1. Property ID?		
35.17.2. State Code		
35.17.3. Subdivision		
35.17.4. Neighborhood		
35.17.5. Entities		
35.17.6. Situs Address		
35.17.7. Owner		
35.17.8. Land size		
35.17.9. Improvement class		
35.17.10. Improvement year built		
35.17.11. Sale date		
35.17.12. Price/sq ft		
35.17.13. Sale type		
35.17.14. Building permit number		

35.17.15. Permit date		
35.17.16. Permit status		
35.17.17. Appraiser		
35.17.18. Inspection date		
35.17.19. Effective acres grouping		
35.18. Does GIS locate the property and zoom to the property in the GIS map view?		
35.19. Can the application integrate with multiple data sources?		
35.19.1. Shapefiles?		
35.19.2. Rasters?		
35.19.3. Map packages?		
35.19.4. SDE?		
35.19.5. Geodatabase		
35.19.6. ESRI published basemaps?		
35.20. Can aerial imagery be viewed from GIS?		
35.21. Can a user print a preliminary appraisal roll for properties selected in the GIS?		
35.22. Can a user print an appraisal card for properties selected from the GIS front-end?		
35.23. Can a user add a text note to a property within the GIS front-end?		
35.24. Can the user view linked properties and details of each property from the GIS front-end?		
35.25. Can the user 'bookmark' specific properties to return to within the GIS front-end?		
35.26. Does the system provide a quick, easy, and user-friendly process for adding GIS files?		
35.27. Does the system allow for mass update of CAMA data using a GIS front-end?		
35.28. Can GIS be used in connection with Pictometry?		
35.29. Can GIS be used in connection with Google Maps?		

35.30. Can GIS be used in connection with Bing maps?		
35.31. Can GIS be used in connection with Cyclomedia?		
35.32. Can the user select and deselect properties for processing from the GIS front-end?		
35.33. Can the user apply Symbology to layers within the GIS front-end?		
35.34. Can a user apply spatial analysis in the GIS front-end?		
35.34.1. Buffer		
35.34.2. Clip		
35.34.3. Intersect		
35.34.4. Union		
35.34.5. If so, can the user update properties from the GIS front-end selected by spatial analysis tools within the GIS front-end?		
35.35. Can the user select properties by radius or buffer from GIS?		
35.36. Can the user view linked properties, including BPP, and details of each property from the GIS front-end?		
36. Portable Field Devices	Yes/No	Cost to Modify
36.1. Does the system allow electronic field devices to be used for fieldwork?		
36.2. Are the proposed portable field devices Lightweight? Approx Weight:		
36.3. Does the system provide a user-friendly interface for fieldwork?		
36.4. Is that interface designed specifically for mobile touch devices?		
36.5. Does the system provide a way to configure, customize, and define the user interface on the tablet device for use in the field? This configuration should be available and not require additional programming by the vendor.		
36.6. Is the field device required to have an open internet connection in order to function?		
36.7. Will the field device work in both an online and offline mode?		
36.8. Does the field device automatically provide an optimal route for visiting the parcels?		
36.9. Can the appraiser view the property information on one screen in an electronic field card view?		

36.10. Does the field solution allow for data validation during entry by the appraiser? This is to help aid the appraiser's data entry and only allow valid values to be entered into the system.		
36.11. Does the field solution have the ability to directly update the CAMA database so that no additional data entry is required after the field inspection is complete?		
36.12. Does the field solution allow for an administrative and quality control application where the data collected in the field can be validated prior to being saved within the main CAMA system?		
36.13. If data is found to need correction, can a supervisor or other authorized user either correct the data and/or push it back to the appraiser while in the field to make additional modifications?		
36.14. Can a supervisor or another authorized user mass-update properties to be pushed into the CAMA system?		
36.15. Can the office staff and the field appraisers use the field device to communicate back and forth with each other electronically within the solution?		
36.16. Is the property account available for data entry in the office while the account is being worked on in the field by the appraiser? The field solution should not lock the parcel in the office.		
36.17. Are GIS maps available in the field device?		
36.18. Does the field device allow the user to sketch the property while in the field without using a separate application?		
36.19. Can the field appraiser start sketching one building or part of a building and then start another without having to finish the first building sketch? Can the appraiser walk the building once rather than multiple times to capture all the details of the building and fully complete the property sketch?		
36.20. Does the field sketch application integrate with Bluetooth electronic laser measuring devices (like Disto)?		
36.21. Does that integration allow the field appraiser the ability to take measurements with an electronic measuring device (like Disto) and have those measurements automatically transferred to the device?		
36.22. Can the field appraiser use those transferred measurements to sketch the property without having to enter the measurements or draw manually?		
36.23. Does the GIS map show the field appraiser which properties need to be worked on?		

36.24. Does the GIS map show the field appraiser the properties that have been worked on?		
36.25. Does the GIS map allow the field appraiser to open properties that were not already part of the work group directly from the field?		
36.26. Does the GIS map allow properties to be highlighted that match advanced search criteria?		
36.27. Does the field device have an integrated camera?		
36.28. Does the field device allow multiple pictures to be taken for a single property?		
36.29. Does the field device allow multiple pictures to be added to the account with a single click per picture?		
36.30. Can the appraiser use the GIS map(s) to view and select the properties they wish to work on the field device?		
36.31. Can the appraiser view a color gradient thematic map showing certain CAMA data trends within GIS? For example, the ability to graphically show a neighborhood's effective age or class breakdown.		
36.32. Can a street layer be used so that the appraiser has street names when in an offline mode?		
36.33. If I have Pictometry Connect, can the field device utilize that information (without opening a separate application) so that I can view my Pictometry data in the field?		
36.34. Does the field device allow a user to work on the BPP Account?		
36.35. Can the user attach a picture to a BPP account?		
36.36. Can the user create a new account?		
36.37. Can the user delete an account?		
37. Internet/Website	Yes/No	Cost to Modify
37.1. Does the system allow for live publishing of Appraisal Information on the Internet?		
37.2. Does the system allow support tickets to be entered and monitored on the Internet?		
37.3. Does the system allow Taxpayers to file an HS Exemption Application online?		
37.4. Does the system allow an Agent to file non-HSfile non-HS applications online?		

37.5. Does the system allow a Taxpayer to verify their ownership and update their mailing address and other contact information online?		
37.6. Does the application support automated chat or other AI customer assistance features?		
37.7. Does the system suppress confidential information from the general public while making it accessible to the authorized owner or agent via their specific online account?		
37.8. Does the system allow an Agent to file an HS Exemption Application online?		
37.9. Does the system allow an Agent to file non-HSfile non-HS applications online?		
37.10. Does the system allow an Agent to manage fiduciary responsibilities online, including filing the Appointment of Agent and removing FID authority?		
37.11. Does the system allow an owner to manage their agent online?		
37.12. Does the system allow filing a BPP rendition online?		
37.13. Does the system automatically import online application data into the correct fields in the database?		
37.14. Does the system allow the user to configure custom online applications and import the data into the correct fields in the database?		
37.15. Does the system allow the user to survey rental rates and vacancy online and populate the results into the appropriate fields of a table in the database for analysis?		
37.16. Does the system allow the user to generate custom surveys and map the results into appropriate fields and tables in the database?		
37.17. Does the system allow HCAD appraisers to access and update data online?		
37.18. Does the system include an ARB database as required by state law?		

16. Contact Information:
Krystal L. McKinney, RPA. CCA
Chief Appraiser
Galveston Central Appraisal District
9850 Emmett F. Lowry Expressway, Suite A
Texas City, Texas 77591

Email: gcad@galvestoncad.org
Phone: (409)-935-1980