Functional_General Requirements Tab

Level	Level from 1 - 4 (highest - lowest) associated with business requirement hierarchy. Row formatting and shading is associated with these values. In addition, the level is used to determine the item number. The following functional areas has been identified.
	1.1 Parcel Management
	1.2 Ownership and Transfers
	1.3 Real Property Valuation
	1.4 Exemptions
	1.5 Calamities
	1.6 Unsecured Property
	1.7 Roll Management
	1.8 Appeals
	1.9 General Requirements
Item #	A unique numbering scheme is maintained for each requirement for traceability and testing purposes.
Requirements Description	Business requirements identified for the project
Detailed Description	Additional explanation of business requirements (optional). Some of the scope items are self explanatory and doesn't require more clarity. If the Scope item is not clear, provide more details for clarity.
Priority	**Must Have** These features that must be included before the product can be launched. Think of them as very high priority requirements for the APAS project as this is the minimum scope for the product to be useful.
	Should Have These requirements are also high-priority requirements, and are every bit as important as the requirements in the must category. However, there might be workarounds that satisfy these requirements or they may not be as time critical.
	Could Have These desirable requirements are of lesser priority and are nice to have capabilities in the solution. They really don’t affect anything else in the solution one way or the other and will be included if time and resources permit. These will be the first features to be removed from scope if the project’s timescales are later at risk.
	Won't Have (But would like in future) These features that have been requested but are explicitly excluded from scope for the planned duration, and may be included in a future phase of development.

Proposer Comments	Proposers shall indicate their proposed solution(s) ability to fulfill each requirement. Please provide your response in detail in the Proposer comments column. Proposers are to indicate their compliance in the “Proposer Comments” column. Proposer must articulate and provide evidence of how they meet the requirements.

Defined Terms / Acronyms

Defined Term	Acronym (if used)
Assessor Property Assessment System	APAS
Assessor's Parcel Number	APN
AG	Agriculture
Business Personal Property	BPP
Business Property Statement	BPS
Board of Equalization	BOE
Base Year Value	BYV
Change in ownership	CIO
Computer Assisted Mass Appraisal	CAMA
Construction in Process	CIP
Cost Per Square Foot	CPSF
Corporate Transfer	CO
Cost Of Living Adjustment	COLA
Date of Record	DOR
Date of Value	DOV
District	DIST
Doing Business As	DBA
Direct Enrollment	DE
Factored Base Year Value	FBYV
Fictitious Business Name	FBN
Fiscal Year	FY
Land and Improvements	L & I
Leasehold Improvements	LHI
Legal Entity Ownership Program	LEOP
Marshall & Swift	M & S
Multiple Claim Listing	MCL
Multiple Listing Service	MLS
National Automobile Dealer's Association	NADA
Neighborhood	NBHD
Optical Character Recognition/Reader	OCR
Organizational Clearance Certificate	OCC
Portable Document Format	PDF
Possessory Interest	PI
Preliminary Change of Ownership Report	PCOR
Property Use Code	PUC
Revenue and Taxation Code	R & T Code
Standard Data Record	SDR
Electronic Standard Data Record	ESDR
Social Security Number	SSN
San Francisco	SFO
San Francisco International Airport	SFIA
San Mateo County Assessor	SMCA
Special Properties	SP
Supplemental Clearance Certificate	SCC
Tax Rate Area	TRA
Timberland Production Zone	TPZ
Veteran's Affairs	VA

Level (1 - 4)	Item # (auto)	Requirements Description
1	1	ASSESSOR FUNCTIONAL REQUIREMENTS
2	1.1	Parcel Management
3	1.1.1	General Requirements
3	1.1.2	Recorded Documents
3	1.1.3	Recorded Map
3	1.1.4	Owner Requested Changes
3	1.1.5	Drafting Review/Update
3	1.1.6	Situs Changes
3	1.1.7	Non-Assessable Parcels
3	1.1.8	TRA Changes
2	1.2	Ownership and Transfers
3	1.2.1	Identify Recorded Documents
3	1.2.2	Exclusions
3	1.2.3	Unrecorded Event
3	1.2.4	Legal Entity Ownership Program(LEOP)
3	1.2.5	Processing Change in Ownership (CIO) Documents
2	1.3	Real Property
3	1.3.1	General Requirements
3	1.3.2	Building Permits
3	1.3.3	Construction (non-permit) discovery
3	1.3.4	Non-SFIA Possessory Interests (Special Properties)
3	1.3.5	SFIA Possessory Interests (SP)
3	1.3.6	Landing Rights (SP)
3	1.3.7	Comcast PI (SP)
3	1.3.8	Residential CIO
3	1.3.9	Construction
3	1.3.10	Processing New APN
3	1.3.11	Government CIO
3	1.3.12	Commercial CIO
3	1.3.13	Prop 60/90/110/58/193
3	1.3.14	Williamson Act and TPZ Sales and Supplemental (SP)
3	1.3.15	Mills Act (SP)
3	1.3.16	California Water (SP)
3	1.3.17	Gas/Mine & Mineral (SP)
3	1.3.18	Mobile Home Assessment
3	1.3.19	Direct Enrollment
3	1.3.20	Real Property Valuation Approval and Enrollment
2	1.4	Exemptions
3	1.4.1	Homeowner's Exemption Filing
3	1.4.2	Multiple Claims
3	1.4.3	Disabled Veterans
3	1.4.4	Historic Aircraft Initiation
3	1.4.5	4% Commercial Fishing initiation
3	1.4.6	Historic Aircraft Exemption
3	1.4.7	Commercial Fishing Exemption

3	1.4.8	Institutional Exemption
2	1.5	Calamities
3	1.5.1	General: Calamities
3	1.5.2	Real Property Calamities
3	1.5.3	Restore Real Property Calamities
3	1.5.4	Business Personal Property Calamities
2	1.6	Business Personal Property
3	1.6.1	General: Business Property Statements
3	1.6.2	General - Business Personal Property
3	1.6.3	Business Discovery
3	1.6.4	Prepare for Business Property Statements
3	1.6.5	Electronic Business Property Statements
3	1.6.6	Special Business Property and Repeat Request Statements
3	1.6.7	Receive & Process Business Property Statements
3	1.6.8	Secured Unprocessed/Non-Fliers
3	1.6.9	Unsecured Unprocessed/Non-Fliers
3	1.6.10	Direct Assessments
3	1.6.11	Business Personal Property Audits
3	1.6.12	Post Audit Processing
3	1.6.13	Aircraft Discovery
3	1.6.14	General Aircraft Valuation
3	1.6.15	Boat Discovery Annual
3	1.6.16	Boat Discovery Monthly
3	1.6.17	New and MBT Boat Valuation
3	1.6.18	Annual Existing Boats <$100K(PBT Boats)
3	1.6.19	Leased Equipment Discovery
3	1.6.20	Leased Equipment Mailing
3	1.6.21	Leased Equipment Processing
3	1.6.22	Hand Bills
2	1.7	Roll Management
3	1.7.1	Roll Corrections and Escapes
3	1.7.2	Secured Value Transfer from Unsecured Master File
3	1.7.3	Roll Close
3	1.7.4	Roll Open
3	1.7.5	Real Property Supplemental Roll
3	1.7.6	Business Personal Property Supplemental Roll
2	1.8	Appeals
3	1.8.1	General Requirements for Appeals
3	1.8.2	Receipt of Official Notification of Appeals Schedule
3	1.8.3	Hearing Preparations & Discussions
1	2	ASSESSOR GENERAL REQUIREMENTS
2	2.1	General Requirements
3	2.1.1	Scheduling / Calendars
3	2.1.2	Correspondence Templates
3	2.1.3	Web Portal
3	2.1.4	Interfaces / External Data Files

3	2.1.5	Workflow / Worklist
3	2.1.6	Data
3	2.1.7	Calculations
3	2.1.8	Analytics and Reporting
3	2.1.9	Address
3	2.1.10	Penalties
3	2.1.11	Valuation
3	2.1.12	Field Inspection/Audit
3	2.1.13	Agency

Renumber, Format & Group

Assessor Property Assessment System (APAS)
Template F - Assessor Functional and General Specifications Matrix

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
1	**1**	**ASSESSOR FUNCTIONAL REQUIREMENTS**			
2	**1.1**	**Parcel Management**			
3	**1.1.1**	**General Requirements**			
4	1.1.1.1	The System shall provide authorized users with the capability to create, edit, activate, and deactivate parcel records including, but not limited to:	The system should also keep an audit trail(with time-stamp & user id) of all the changes.	Must Have	This is included in proposed solution's Parcel Management Utility.
4		a. Creating new parcel records	1. create new parcels from existing parcels (including from multiple APNs to multiple APNs and track the % of each parent parcel getting allocated to each of the child parcel and make sure that the totals reconcile) 2. The System should create the effective date of the new parcel based on pre-defined business rules(e.g.: effective date of the new parcel is the date on which the owner requested the creation of the new Parcel) and provide the capability for the authorized user to enter/change the effective date of the parcel. 3. The system should notify the assigned appraiser about the new parcel creation	Must Have	Please see the response in 1.1.1.1 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		b. Creating new -Tracking Parcels	They system shall have the capability to allow the authorized user to create new tracking parcels which should be linked to the original main/parent parcel. The System shall have the capability to suggest APNs for new Tracking parcels based on the parent parcel's APN. The Authorized user should have the ability to override the System generated/suggested APN(s). The new Tracking Parcel should be created with a suffix to the original main parcel number and should be alphanumeric. The system shall also provide the capability for the authorized user to enter on the Tracking Parcel, including but not limited to : the owner name and associated information (document, document ID, situs, details of the property owned). Tracking Parcels are used for the purposes of : 1. Unrecorded Time-share & Co-Ops 2. Handling Unrecorded Divided Interest assessments more effectively 3. Etc. **These Tracking Parcels will be created by mapping team based on the request by Appraisers. These are for internal use by the appraisers and will not be present on the official Roll but the values on these tracking parcels will roll-up to the parent parcel value**		Please see the response in 1.1.1.1 above
4		c. Editing existing parcel record information	The System shall have the capability to prompt authorized users to add details / import from other records to new APNs including, but not limited to: a. Parcel characteristics b. Legal description c. Situs address	Must Have	Please see the response in 1.1.1.1a above
4		c. Creating interim parcel records	The system should be able to create temporary '800-XXX-XXX' parcel record for interim/easy processing	Must Have	Please see the response in 1.1.1.1a above
4		d. Editing existing interim parcel records		Must Have	Please see the response in 1.1.1.1a above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		e. Splitting parcels	For splits, the System shall provide the capability for authorized users to: 1. Split parcels from one APN to multiple APNs 2. Document the percentage of land value from the originating parcel 3. Document the percentage of improvement value from the originating parcel The System shall have the capability to suggest APNs for new parcels based on : the parent parcel's APN or prompt authorized users to manually enter the book, page, or block. The Authorized user should have the ability to override the System generated/suggested APN(s). The System shall have the capability to establish and store the relationship between newly split APNs and the original APN(s) that need(s) to get retired as the result of the split. Currently, when a parcel split happens for the purpose of generating separate Tax Bills(without change to the physical boundary of the parent parcel), Mapping team assigns the new child parcel(this is currently referred to as “Sub-parcels”) numbers to be same as the parent parcel number except for the last digit. For the child parcel, the last digit will be a non-zero number. In this scenario, the parent parcel number ending with zero is retired(will not be present on the roll going forward) and the sub-parcels will be present on the Roll.	Must Have	This range of functions is included in in the proposed system Parcel Management Utility.
4		f. Combining parcels	Combine parcels from multiple APNs to one APN The System shall have the capability to establish and store the relationship between newly combined APN(s) and the original APNs that need to get retired as the result of the combine.	Must Have	PAR-10 This range of functions is included in in the proposed system Parcel Management Utility.
4		g. Create new parcels from existing parcels (including from multiple APNs to multiple APNs)		Must Have	See response in section 1.1.1.1.a
4		h. Retiring parcel records	Due to split and combine. All the retired parcels should be displayed in such a manner that authorized user is alerted about it	Must Have	This range of functions is included in in the proposed system Parcel Management Utility.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		i. Flagging Unsecured Account/s affected by splitting/combining of parcels and notification of authorized users	When a change in parcel occurs, all the affected Unsecured Account/s should be flagged and the authorized users should b e notified		If this is referring to having an unsecured bill on secured property (PROP 8). This would be handled in the new PAA system's dashboard notification to a signed in user. Currently, this scenario is manually flagged, but a utility could be included in the proposed solution to trap this scenario automatically, but due to the high cost this trap will not be part of our base proposed estimate.
4	1.1.1.2	The System shall have the capability to create common area parcels	The common area parcels are different from regular parcels because the values may be absorbed by the adjacent parcels or it could be separately assessed to the developer/home owners' association E.g.:- Common recreational areas like club houses, swimming pool etc. for condominium development.	Must Have	Yes, this would be similar to parcels flagged with multiresidental property types. The value is calc'd based on the percentage of ownership, including common area alottments to individual parcel owners. Multiple Characteristics for Tenants in Common scenarios can be created. The system can also have a unique parcel for the condominium development or HOA to be appraised and billed based on common area property.
4	1.1.1.3	The System shall automatically notify assessor staff to value a new APN when a new APN is created		Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4	1.1.1.4	The System shall allow authorized users to create new parcels for the next roll year's work by simply selecting the roll year	For e.g.: the user should have the ability to work on 2018 roll year, when 2017 is the roll being prepared.	Must Have	The proposed system will have the capability of providing two working year rolls.
4	1.1.1.5	The System shall provide authorized users with the capability to mass update parcel characteristics either from an excel spreadsheet or in a manner that will import data from the GIS System	The system shall provide authorized users with the capability to mass update parcel characteristics which includes but is not limited to: a. Situs Address b. Parcel Size c. Legal Description d. Tax Rate Area (TRA)	Must Have	The proposed solution provides for this function via a manual process which is only available for business accounts.
4	1.1.1.6	The System shall provide authorized users with the capability to undo changes or restore parcels to a prior version when no activities have been completed on the file	Before allowing to undo changes/restore parcels, the system should check the state at which the activity is and perform the following : 1. If the activity is Open(if the appraiser has not done the subsequent steps) - Reverse to prior state of the activity 2. If activity is not Open then the system should reverse to the previous state and notify the assigned appraiser	Must Have	The proposed solution would provide this functionality via the Parcel Management utility after modifications were instituted for undoing a change to a parcel.
4	1.1.1.7	The System shall retain historical versions of parcel records regardless of parcel status including, but not limited to:		Must Have	This function is available via the Parcel Ancestry View of the proposed solution.
4		a. A longitudinal connection(genealogy) of current parcel records and information to historical parcel records and information(when not in a 1:1 ratio due to parcel changes	The system shall have the capability to maintain the parcel history (genealogy) for all historical splits(including lot-line adjustments) and combines.	Must Have	Please see the response in 1.1.1.7 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		b. Parcel Records of any: 1. Combinations 2. Subdivisions 3. Leases 4. Cancellations 5. Retirements 6. Easement	The list given in b. is just an example. The system needs to retain all historical information and connections related to each parcel		Please see the response in 1.1.1.7 above
4	1.1.1.8	The system shall have the capability of interfacing with the other document management systems and also link Property records to all associated images from our imaging system.	The system should interface with document management systems and make available to the users, the following documents: -address change notices -land docs (recorded docs) -Mapping special files (owner's requests and others) -Recorded maps	Must Have	An interface with the Assessor's imaging would have to be developed in order to then associate these objects with an individual property record.
4	1.1.1.9	The System shall have the capability to trace parcel history including, but not limited to:		Must Have	This is provided via the Parcel Ancestry View.
4		a. Splits			This is provided via the Parcel Ancestry View.
4		b. Combines			This is provided via the Parcel Ancestry View.
4		c. Status including, but not limited to:			This is provided via the Parcel Ancestry View.
4		1. Active			This is provided via the Parcel Ancestry View.
4		2. Retired			This is provided via the Parcel Ancestry View.
4		3. Interim			This is provided via the Parcel Ancestry View.
4		d. Values			This is provided via the Parcel Ancestry View.
4	1.1.1.10	The System shall have the capability to review and display pending activities existing on parcel/s	All open activities should be displayed upon request by the user. The system should provide flexibility for the user to rearrange the activities. Initially display by the date of the event.	Must Have	This functional requirement will be addressed via user/role defined dashboard page. On the parcel page activities are identified as well as historical information provided as defined in 1.1.1.9.
3	**1.1.2**	**Recorded Documents**			
4	1.1.2.1	The System shall have the capability to identify, retrieve, and route recorded documents and associated indexed information from the Recorder's Office to predetermined Assessor Staff as preconfigured in the System. Documents and indexed information may include, but are not limited to:		Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4		a. Scanned documents			Please see the response in 1.1.2.1 above
4		b. Document type			Please see the response in 1.1.2.1 above
4		c. Affected property(s) by APN			Please see the response in 1.1.2.1 above
4		d. Legal parcel description	Both the full and the simplified legal description		Please see the response in 1.1.2.1 above
4		e. Ownership information			Please see the response in 1.1.2.1 above
4	1.1.2.2	The System shall provide the capability for authorized users to research parcel information and associated documentation including, but not limited to:		Should Have	This information would be available from the proposed solution 's Change in Ownership Processing and Parcel Management Utilities. Any details not displayed within the two views, is accessible in a drilldown fashion.
4		a. Legal description			Please see the response in 1.1.2.1 above
4		b. Deeds			Please see the response in 1.1.2.1 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.1.2.3	The System shall have the capability to compare full legal descriptions from the recorded documents, if available, and route the document to: 1. Mapping team if there is a discrepancy 2. CIO team if they are identical		Must Have	This business rule will be performed in the Workflow management life cycle. Similarly, other business rules can be added to route parcels to individual team members. For example, a change in physical address can be compared, identified and routed to a CIO team member.
3	**1.1.3**	**Recorded Map**			
4	1.1.3.1	The System shall have the capability to identify, retrieve, and route recorded map and associated indexed information from the Recorder's Office to Assessor Staff. Files and indexed information may include, but are not limited to:		Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4		a. Map Titles			This information is available from our Change in Ownership Processing and Parcel Management Utilities. Any details not displayed within the two views, is accessible in a drilldown fashion.
4		b. Volume Number			This information is available from our Change in Ownership Processing and Parcel Management Utilities. Any details not displayed within the two views, is accessible in a drilldown fashion.
4		c. Page number			Please see the response in 1.1.3.1 above
4		d. Submitting party			Please see the response in 1.1.3.1 above
4		e. APN			Please see the response in 1.1.3.1 above
4		f. Auto CAD file link			Please see the response in 1.1.3.1 above
4		g. Recorded Date			This information is available from our Change in Ownership Processing and Parcel Management Utilities. Any details not displayed within the two views, is accessible in a drilldown fashion.
4	1.1.3.2	The System shall have the capability to access the document repository to access the recorded maps		Must Have	This is an HTTP request that can be added to various locations througout the system via linked text or button clicks as needed.
3	**1.1.4**	**Owner Requested Changes**			
4	1.1.4.1	The system shall have the capability to allow the assessor staff to input the information related to the requests that we receive through a medium outside the Web Portal(for e.g.: paper, e-mail)		Must Have	This information is available from our Change in Ownership Processing and Parcel Management Utilities. Any details not displayed within the two views, is accessible in a drilldown fashion.
4	1.1.4.4	The System shall have the capability to evaluate the information submitted by the property owner/provided by the assessor staff based on business rules for additional required supporting documents	The business rules include: 1. TRA is the same(If different then the system should check whether the BOE requirements are met). 2. No outstanding tax bills If any of the above criteria is not met then the system should prevent the requestor from submitting the application and inform the requestor about the next step) 3. The planning department approval has been received and the requestor has attached the approval document	Must Have	The Assessor solution does not provide for the business rule solutions in a web portal medium. However, Sapient can demonstrate its development skills by including the business rules in the CIO processing function.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.1.4.5	The System shall have the capability to display a summary of the parcel change request	The summary includes: 1.Parcel numbers 2.Owner's name and signature 3. Check list of all business rules 4. If for subdivision, Planning Department's signature	Should Have	The Assessor solution does not provide for the business rule solutions in a web portal medium. However, Sapient can demonstrate its development skills by including the business rules in the CIO processing function.
3	**1.1.5**	**Drafting Review/Update**	**Retrieving data/maps from Assessor's GIS System**		
4	1.1.5.1	The System shall provide the capability for authorized users to import selected attributes from the County and/or Assessor's GIS/AutoCAD System and save the attributes to the affected parcels	The attributes are : 1. Legal description 2. TRA 3. Parcel size 4. Situs address 5. Reason code	Must Have	This range of functionality would have to added to the proposed solution's Parcel Management utility.
4	1.1.5.2	The System shall have the capability to retrieve any maps from the appropriate locations by book and page number for the specific APN.		Must Have	This is an HTTP request that can be added to various locations througout the system via linked text or button clicks as needed.
3	**1.1.6**	**Situs Changes**			
4	1.1.6.1	The System shall have the capability to link new Situs Change Notices to the parent parcel, for the pending new child parcels	The Situs change notices are coming from Cities / County Planning Department	Should Have	The format of the situs change notices from the various cities would require a mechanism to import each unique version. Then, processing the requests into Workflow Line Items for authorized and assigned staff would be created.
4	1.1.6.2	The System shall have the capability to keep history of situs change information including scanned or PDF Situs Change Notices for a pre-configured period of time defined in the R&T Code	Current document retention period defined in the R&T Code is -> Assessor may destroy any document when **six years** have elapsed since the lien date for the tax year for which that document was obtained. The system should interface with the document repository to retrieve the scanned documents	Must Have	Situs change history can be retained for an indefinite period of time via an audit log of updates, additions, and removals performed on situs addresses. The audit log also records and links the reason, source, and processing details associated with situs changes.
4	1.1.6.3	The system shall have the capability to interface with the external systems of city/county planning departments to electronically retrieve the situs change information		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations.
4	1.1.6.4	The System shall have the capability of associating a parcel with multiple situs addresses and lessee information (as is the case with commercial buildings)	For e.g.: A shopping complex is one parcel with multiple tenants. So the system should have the capability to save & retrieve the details(such as lease information, ownership interests) about multiple tenants/lessees	Must Have	The proposed solution is able to asssociate multiple situs address with a single APN. There is the ability to flag one as the primary situs address.
3	**1.1.7**	**Non-Assessable Parcels**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.1.7.1	The System shall have the capability to retrieve and display parcel attributes and information associated with a deactivated parcel when an authorized user searches for or enters a deactivated APN in the System	Parcel Attributes: 1. Legal description 2. TRA 3. Parcel size 4. Situs address 5. Reason code	Should Have	This range of functionality is provided via the proposed solution's Multi-Year table structures. This solution is able to save all Parcel information for an unlimited number of years, activities, parcel changes, Changes in Onwership, and many more attributes.
4	1.1.7.2	The System shall provide the capability for authorized users to select to deactivate and reactivate(at a later point of time) a non-assessable parcel for the given effective roll (the roll being prepared)	The non-assessable parcels are identified based on the below criteria : 1. BOE Parcels(Not locally assessed) 2. Government Owned Streets(eg:Vacating of streets)(Not assessed and non-taxable) If a particular parcel was inactivated because of a reason(for e.g.: transferred to BOE and if the parcel is transferred back to us at a later point of time) and then need to use the same parcel later on, the user should be able to reactivate the same old parcel using the original APN.	Should Have	The proposed solution comports with this request via the System's User-defined Coding schema.
4	1.1.7.3	The System shall have the capability to automatically assign a new APN number to a previously un-assessed property based on preconfigured business rules when initiated by an authorized user	The system shall have the capability for the authorized user to input the book and page/block and then the system shall automatically generate the new APN as the next whole number in the same book and page/block	Must Have	New APNs are created in the proposed solution via the Parcel Mangage utility. Automatic Account number asignment is a feature of the tool.
4	1.1.7.4	The System shall have the capability to prompt authorized users to add details to new APNs including, but not limited to:		Must Have	The proposed system will prompt the user to enter the given property attributes when a new account is created.
4		a. Parcel characteristics	E.g.: Lot size, acreage, use code	Must Have	Please see the response in 1.1.7.4 above
4		b. Legal description		Must Have	Please see the response in 1.1.7.4 above
4		c. Situs address		Must Have	Please see the response in 1.1.7.4 above
4	1.1.7.5	The System shall have the capability to update the status of a selected parcel to "Non-assessable" when deactivated by an authorized user		Must Have	The Parcel Management Utility will manage this functionality
4	1.1.7.6	The System shall exclude all "Non-assessable" properties from required valuations		Must Have	The Property Status Code and Account Use Code are the two property attributes used to identify Non-assessable property.
3	**1.1.8**	**TRA Changes**			
4	1.1.8.1	The System shall have the capability to update information based on data files from GIS System for those APNs affected by TRA boundary changes		Must Have	This functional request would be accomplished via the interface to the County's GIS system
4	1.1.8.2	The System shall have the capability to interface with the GIS System to determine all APNs affected by BOE provided TRA boundaries		Could Have	This functional request would be accomplished via the interface to the County's GIS system
4	1.1.8.3	The System shall have the capability to display a summary of all APN and TRA changes for the Assessor GIS Team to review and approve for the given roll year when the user indicates that all changes have been completed		Should Have	This activity would be an enhancement to the proposed solution's Workflow module.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.1.8.4	The System shall generate annual notifications for the Controller's office when TRAs have been updated with correct APNs for the working assessment roll year	E.g.: Email notification	Must Have	TRA changes on the Working Roll may be extracted from the Audit Log in numerous common file formats such as, Excel or comma separated values (csv) for presentation to the Controller
2	**1.2**	**Ownership and Transfers**			
3	**1.2.1**	**Identify Recorded Documents**			
4	1.2.1.1	The System shall have the capability to retrieve and display the recorded documents from the Recorder's System	Business Rule - > Certain recorded documents need to be reviewed for their effect on title and their assessability. These documents should be made available to CIO Team. The document types include, but not limited to : Grant Deeds, Quitclaim Deeds, Trustee Deeds, etc.	Must Have	This functionality would be located on the Recorded Document Processing/Logging Utility. It is also available any place in the system where a Recorder's Document Number/ID is displayed. The field is displayed as a hyperlink.
4	1.2.1.2	The System shall have the capability to retrieve/import daily and display indexed information from the Recorder's System including, but not limited to: a. Grantor name b. Grantee name c. Parcel number d. Document type e. Recorded document number f. Transfer tax g. Recording date h. Document title	When a document number is entered the corresponding imaged document, PCOR, and any other imaged material, should be displayed. All information listed below, items a through h, should be populated. Note on f - Transfer tax should be converted to the actual dollar amount of consideration.	Must Have	The data fields indicated in this functional request are all part of the details the proposed solution imports for each deed.
4	1.2.1.3	The System shall have the capability to compare the recorded documents and highlight the differences	The System shall make use of OCR technology to read scanned version of recorded documents.	Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	1.2.1.4	The System shall have the capability to route various documents to the relevant authorized user depending on the document type	E.g. : For lease documents, currently the relevant authorized user is the CIO Team Supervisor	Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4	1.2.1.5	The System shall have the capability to associate the retrieved document and indexed information with the appropriate parcel/account in the System	If the parcel number is indexed by the recorder, the system should recognize and display the assessor's parcel information including: a. Current owner(s) and ownership information b. Address information from existing records and PCOR if applicable c. Legal description d. Current document and Date Of Value e. Current DIST/NBHD/USE CODE	Must Have	The proposed solution can import the Parcel Number that is associated with the deed from the Recorder. If the CIO staff determines that the Parcel Number is incorrect, it may be changed.
4	1.2.1.6	The System shall have the capability to display relevant information from the System for review along with recorded documents including, but not limited to: a. Current owner(s) and ownership information b. Address information from existing records and PCOR if applicable c. Legal description	If the parcel number is not indexed, the system shall allow authorized users to enter the parcel number. Once the parcel number is entered, the system should display the current parcel information including items a - c	Must Have	This is part of the CIO Workflow processor.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.2.1.7	The System shall have the capability for the Authorized User(assessor staff, in this context) to flag the property record if there is a cloud on the title of a property	For e.g.: The system shall provide the capability for the assessor staff to flag property records, if the indexed grantor information differs from the Assessor's current record.	Must Have	This is part of the CIO Workflow processor.
4	1.2.1.8	The System shall have the capability for the Authorized User(assessor staff, in this context) to update the property record with the correct Activity Code	Examples of Activity Code includes, but not limited to: CIO-SALE, CIO-SALEM, CIO-Govt, CIO-GovtM etc. The Authorized user should be able to access the recorded document for the specific CIO while doing this update to make sure the accuracy of the Activity Code	Must Have	This is part of the CIO Workflow processor.
4	1.2.1.9	The System shall have the capability to identify and notify assessor staff if there are any mismatches between the recorded document and the parcel records according to preconfigured business rules	The System Should notify the assessor staff if: 1. The parcel is not owned by the Grantor 2. Legal description is different	Should have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.1.10	The System shall have the capability to conduct preconfigured validation checks including, but not limited to: a. Confirming current mailing address is present for new owner		Must Have	The proposed solution addresses this request via the CIO Workflow Subsystem.
3	**1.2.2**	**Exclusions**			
4	1.2.2.1	The System shall have the capability to generate appropriate Exclusion Letters based on transfer type codes and send them to property owners electronically or via US mail	The system shall have the capability to generate various types of exclusion letters based on the corresponding stored templates	Must Have	The proposed solution fully comports with this functional request.
4	1.2.2.3	The System shall have the capability to monitor for exclusion letter responses and send notifications to the authorized users about it		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	1.2.2.4	The System shall have the capability for the authorized user(Assessor CIO Staff) to indicate in the system whether a response to an exclusion letter has been received or not, for any given transfer transaction		Must Have	The proposed solution fully comports with this functional request.
4	1.2.2.5	The System shall provide the capability for authorized users to scan, index, and upload exclusion applications ~~letters~~ into the System	These exclusion forms(all exclusion types including Construction exclusion) and any additional submitted documentation, to transfer the base year value from one property to another, should be in the system and made available upon arrival for the CIO section to review.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.2.2.6	The System shall have the capability to optically read, recognize, and index preconfigured text/characters from hard copy exclusion requests including, but not limited to: a. Document number b. Parcel number c. Related document numbers		Could Have	This range of functionality at present does not exist on the proposed solution, and therefore would have to be developed.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.2.2.7	The System shall have the capability to release change of ownership events after a waiting period or when the exclusion request is denied. The system shall also have the capability to document the reason code indicating that the event has been released because there was no response to the exclusion letter or it has been denied.	Many events are changes in ownership (CIO) unless an exclusion is applied for. These events are predetermined CIO events and exclusion letters shall be triggered to be sent by the system. CIO events should be held for a pre-determined time period(currently 45 days), giving owners time to respond to exclusion letters). After the time period, if there is no response, these events needs to be released for reassessment. And these events will become part of the appraiser workflow (the system will have to create a work item in the relevant work queue)	Must Have	The CIO Workflow processor contains a Document Status code with an associated Document Status Level, Document Status Date. The Activity Code assigned to CIO documents triggers the generation of an exclusion letter for the appropriate event and property types, and sets the Document Status Code, Level and Date accordingly. After the "Number of Days to Wait" since the Document Status Date set by the exclusion letter has passed, the CIO Workflow processor will release the document by automatically changing the Status Code to new value that will return the event into the CIO workflow to be processed by an assigned CIO staff member.
4	1.2.2.8	If a response to the exclusion letter is received, the System shall have the capability for an authorized user to review and flag the application for completeness	Rules for completeness check includes, but not limited to : Deadline for application - within 45 days of the Assessor Staff sending the Exclusion Letter request	Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.2.9	The system shall have the capability to identify whether an exclusion application involves other county based on the pre-configured business rules. If yes, then system shall automatically generate a Part D of the exclusion claim form to be sent to the other county.	Business Rules for exclusion involving other counties: 1. Prop 90 - a transfer of base year value from a property in another county to a property in our county, 2. Prop 110 - a transfer of base year value from a property in another county to a property in our county, because of disability.	Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	1.2.2.10	The System shall have the capability for authorized users to send/receive communications to/from other counties for Prop 90 and Inter County 110 exclusion applications	This communications will contain file attachments and it is to seek additional information	Must Have	The details regarding Prop 90 and 110 events may be extracted from the Recorded Documents table into numerous common file formats for sending to other counties.
4	1.2.2.11	The System shall have the capability for authorized users to generate and send communications/notices to property owners when an exclusion application is determined as incomplete or as a non-qualifying application	If the exclusion application/response is incomplete, the system shall generates a cover letter requesting for additional information to be sent back with the original claim forms. In addition, the system should mark with the new send date so that event will not be released to be reassessable.	Must Have	This is an extension of item 1.2.2.7 and is also accommodated Document Status Code, Level, and Date.
4	1.2.2.12	If the Exclusion requirements are not met then the System shall provide authorized users with the ability to select a reason from a list of preconfigured reason codes including, but not limited to: a. R&T code b. Ineligible		Must Have	The proposed solution addresses this functional request by associating a reason code with each deed.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.2.2.13	The System shall have the capability for the authorized user to retain or delete the existing exemption/s on the parcel for the grantor based on the decision made for the Exclusion Request		Must Have	The Change in Ownership Processor or Recorder Document Procesing/Logging utility has a checkbox that is automatically selected for select Activity Codes and Property Use Codes that are configured do so, such as a CIO-SALE on a Single Family Residential Property. The user processing the document may chose to override the system defaulted value by selecting or unselecting this checkbox as required.
4	1.2.2.14	The system shall have the capability to capture data from the exclusion applications and store in the system		Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.2.15	The system shall have the capability for authorized users to input data from the exclusion applications and store in the system		Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.2.16	The system shall have the capability for authorized users to send the exclusion information for Supervisor review and approval		Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.2.17	The system shall have the capability for authorized users to apply exclusions and update the details into the system		Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.2.18	The System shall have the capability to generate various exclusion reports that needs to be submitted to BOE	Current frequency is once in a quarter	Must Have	This information may extracted from the Recorded Documents table in various common file formats for submission to BOE.
3	**1.2.3**	**Unrecorded Event**			
4	1.2.3.1	The System shall provide authorized users with the capability to document unrecorded event discovery including, but not limited to: a. Receiving of unrecorded documents b. Transfer of mobile homes c. Citizen-reported change in ownership and/or property owner deaths via the Web Portal d. Review of vital records e. General discovery including, but not limited to: 1. Newspaper 2. Radio 3. Television 4. Driving by 5. Word of mouth 6. Incoming call	Not all reassessable events are from recorded documents. At times the Assessor needs to create an event. Currently a ten character ID, beginning with UT is assigned. The system should track these numbers and auto populate the next available number.	Must Have	The proposed solution addresses this functional request by via the creation of user-defined unrecorded documents.
4	1.2.3.2	The system shall have the ability to send appropriate forms/questionnaires for appropriate discovery		Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
3	**1.2.4**	**Legal Entity Ownership Program(LEOP)**			
4	1.2.4.1	The System shall have the capability to identify and display San Mateo County relevant properties and associated penalties when the State Board of Equalization monthly report of legal entities that underwent organizational changes is uploaded into the System	A user should be able to search for all property owned, secured and unsecured by organization name. State Board of Equalization monthly report of legal entities includes a field that indicates whether there is a penalty or not	Must Have	This will require some first-hand analysis of the current proposed LEOP design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.2.4.2	The System shall have the capability to generate Corporate Transfer (CO) notices & CO numbers, add to the CIO work queue and send out the notice for properties/transfers identified by authorized users	Not all possible reassessable events are from recorded documents. At times the Assessor needs to create an event. Currently a ten character ID, beginning with CO is assigned. The system should track these numbers and auto populate the next available number.	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.2.4.3	The System shall provide authorized users with the capability to place a LEOP property on hold pending further clarification from County Counsel and/or the BOE or until a configurable number of days(currently 45 days)		Must Have	This functional request is addressed in the proposed solution via the Change in Ownership Processing utility, which includes a document status for such purposes.
4	1.2.4.4	The System shall have the capability to release LEOP property which has been previously placed on hold after a pre-configured waiting period. The system shall also create a flag indicating a reason code as to why the hold has been released		Must Have	Based on the event of a notice going out to the LEOP participants the property record can be placed in a hold status for user defined time period. The hold will be released to the workflow as a normal accessible event.
4	1.2.4.5	The System shall have the capability to calculate penalty amounts for applicable LEOPs based on BOE reported information and the BOE penalty rules		Must Have	The calculation is the based on the 10% of the taxable amount. The proposed system will address this request.
4	1.2.4.6	The System shall have the capability to generate a LEOP penalty list		Must Have	THis report will be generated by a user on demand request
4	1.2.4.7	The System shall have the capability to send LEOP penalty list to Controller based on the defined schedule.		Should Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.2.4.8	The System shall have the capability to populate and send a LEOP penalty notice to the owner including, but not limited to: a. Estimated LEOP penalty	The system shall have the capability to interface with the document repository to access the LEOP penalty letter template	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
3	**1.2.5**	**Processing Change in Ownership (CIO) Documents**			
4	1.2.5.1	The System shall have the capability for the authorized user(Assessor CIO Staff) to identify/flag the type of property transfer to indicate whether a reassessment is required and also choose the corresponding Activity codes to indicate it		Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.5.2	The system shall have the capability to generate and send the CIO Statement when a sale occurs and when the PCOR is missing/incomplete	The subsequent processes does not have a dependency on the receipt of this completed statement	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.2.5.3	The System shall generate workflows based on identified documents according to preconfigured business rules	Business Rule - > The ability to assign the documents to be worked, by type of document, date of recording, grantor and recorded sub-division maps For e.g.: A multi-parcel document(for a sale) will have to be one single work item and needs to be assigned to a single authorized user/a single user group	Must Have	The proposed soluton addresses this functional request via the ability to import the relevant documents deeds from the Recorder's system and moreover, this imported documents become actionable items as these imported items become Workflow line items for the CIO staff to process.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.2.5.4	The System shall provide the capability for authorized user to research and identify if the event precipitating the recording of a document should trigger a reassessment of the property value(s) by displaying information including, but not limited to: a. Ownership history b. Legal description c. Parcel number d. Chain of Title (including percentages) e. Relevant R&T codes and laws f. Vesting, including but not limited to: 1. Tenancy in common 2. Joint tenancy 3. Community property	The staff must have the tools to determine if a recorded document is an assessable event. Historical information should be maintained and easily retrieved for each parcel included the information in items a - f(3)	Must Have	The proposed solution addresses this range of functionalty by providing a mechanism where the Change of Ownership staff are able to verify the assessable status of any given deed based on the information provided on this function's identified key data elements.
4	1.2.5.5	The System shall provide authorized staff with the capability to select the type and or percentage of reassessment including, but not limited to: a. Full b. Partial reassessment c. Divided interest		Must Have	The proposed solution addresses this range of functionalty via the Change of Ownership processing utility, which fully supports; full, partial and divided interest transfers.
4	1.2.5.6	If a partial reassessment is selected, the System shall prompt authorized user to provide additional details including, but not limited to: a. New % to be reassessed b. Base year(s) for remaining owners - date of transfer		Must Have	The proposed solution addresses this range of functionalty via the Change of Ownership processing utility, which in this instance automatically handles the maintenance of old and new base years and applies the selected percentages transferred.
4	1.2.5.7	If a divided interest is selected/indicated, the system shall provide the capability for the authorized user to –route to-the mapping division to create either sub-parcels(as needed) from the main parcel		Should Have	This function may be performed via the Workflow Subsystem and Parcel Management Utility of the proposed solution.
4	1.2.5.8	The system shall provide the capability for the authorized user to enter on the sub-parcel, including but not limited to : the owner name and associated information (document, document ID, situs, details of the property owned).		Should Have	The proposed solution fully comports with this functional request.
4	1.2.5.9	The System shall have the capability to conduct preconfigured validation checks including, but not limited to: a. Ensuring ownership %s equal 100% or an appropriate % as preconfigured in the System in the case of divided or partial interests b. Confirming current mailing address is present for new owner c. Ensure activities and events are maintained in sequence d. The percentage owned by an individual is less than or equal to current percentage.	Additional Notes - > 1. Divided interests can total more than 100% when land and improvements are separately owned. 2. Documents may be recorded out of sequential order and need to be logically processed.	Must Have	The proposed solution addresses this range of functionalty via the Change of Ownership processing utility.
4	1.2.5.10	The System shall have the capability to require work events be processed in a certain order based on preconfigured business rules including, but not limited to: a. Recorded date and event date		Must Have	The proposed solution addresses this range of functionalty via the Change of Ownership processing utility. In this instance it is particularly noteworthy that this utility does not allow documents to be processed out of order
4	1.2.5.11	The System shall provide the capability for authorized users to change the order for processing work events with a selected reason code		Must Have	This function may be performed via the Workflow Subsystem of the proposed solution

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.2.5.12	The System shall have the capability for the authorized user to generate and send exclusion letters	Once these letters are generated, the activity associated with it is put on hold for a configurable number of days(currently 45 days). Also the type of exclusion letter will indicate if a response from the recipient is expected.	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.2.5.13	The System shall have the capability to maintain an unlimited number of years of property history and ownership for all parcels		Must Have	The proposed solution is able to store virtually and unlimited number of historical records.
4	1.2.5.14	The System shall have the capability for the authorized user to direct their activity for Supervisor Approval		Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.5.15	The System shall have the capability to support the transaction processing of multiple parcels on the same Grand Deed.	For E.g.: If there were multiple parcels included in a single sale(Activity code : Cio-SALEM, Cio-GovtM etc.), then there needs to be a link identifying all the other parcels involved. This is helpful for : 1. Validating that each involved parcel has the same type of activity code 2. Validate use codes and/or districts and neighborhoods 3. Determining who should value the entire sale.	Must Have	The proposed solution addresses this request via the CIO Workflow processor
4	1.2.5.16	When a CIO takes place, the System shall generate and send Home Owner's Exemption form to the home owner electronically or via U.S. Mail	Exceptions : If the owner name is a: 1. Bank 2. Mortgage Company etc.	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.2.5.17	The System shall have the capability to track the chaining related details of ownership and transfers along with the corresponding base year information and make it available for analysis/reporting		Must Have	The proposed solution addresses this request via the CIO Workflow processor
2	**1.3**	**Real Property**			
3	**1.3.1**	**General Requirements**			
4	1.3.1.1	The System shall have the capability to enroll assessment values according to user configured County schedules	The system should be able to keep track of secured assessment cycle schedule.	Must Have	The proposed solution is currently configured as a first In, first Out manner only.
4	1.3.1.2	The System shall have the capability to notify the Controller's office of any enrolled assessment values	The system shall notify Controller's of any changes in assessments. Examples Escapes, Roll Corrections., Supplementals and final values.	Must Have	This function may be performed via the Assessment Processing and Enrollment Subsystem of the proposed solution.
4	1.3.1.3	The System shall have the capability to track multiple base years, base year values for land and improvements, and associated characteristics	The system shall be able to keep historical records for snapshots at any given time.	Must Have	The proposed solution provides for this function; e.g.,Partial interest, New Construction, Additions, and other base year value are able to be simultaneously maintained.
4	1.3.1.4	The System shall have the capability to review and display pending activities existing on parcel/s	All open activities should be displayed upon request by the user. The system should provide flexibility for the user to rearrange the activities. Initially display by the date of the event.	Must Have	This part of the Worflow and Event Processing modules.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.1.5	When a work item is selected, the System shall provide a list of prior pending activities in chronological order including, but not limited to: a. Prompting the user to address activities in any recommended or required order b. Providing the capability for the user to directly select to work on any of the prior activities	All open activities should be displayed upon request by the user. The system should provide flexibility for the user to rearrange the activities. Initially, display by the date of the event.	Must Have	This is part of Event Processing and Out-of-Sequence event may not be processed until prior pending events or subseuently processed activities have been resolved. Moreover, activities should be processed in a First In First Out manner to avoid roll corrections and cancelations. The system enforces this rule for all assessable activities. Additionally, in order to provide the user with the capability to directly select work on prior activities it must be done so in a first in, first out order.
4	1.3.1.6	If there are prior pending activities, the System shall prevent reassessments from being saved unless approved by an authorized user with a predetermined reason code including, but not limited to: a. Appeals b. Construction c. Prior change in ownership (CIO) d. APN new e. Calamity	If there is an activity being processed for the parcel which has activities with earlier date of values, the system shall place the activity on hold for further review and approval.	Must Have	Authorized users may override the chronological processing validations.
4	1.3.1.7	If there are prior pending activities, the System shall notify the user that the reassessment information will be held in a pending status until prior pending activities have been resolved or an authorized user has approved the valuation with existing pending items remaining	If there is an activity being processed for the parcel which has activities with earlier date of values, the system shall notify the user about the same and also that the reassessment information will be held in a pending status until prior pending activities have been resolved or an authorized user has approved the valuation with existing pending items remaining	Must Have	Out of Sequence events that are attempted to process are set to a status indicating it is out of sequence and the event will be allowed to be processed once the interfering activities have been resolved.
4	1.3.1.8	The System shall have the capability to monitor for completion of prior pending activities and notify the authorized user	System shall have the capability to monitor the prior pending activities and notify the creator of any pending assessments when prior work queues are completed, including highlighting any changes resulting from the completion of prior work activities	Must Have	All Activities/Events have an associated status that is monitored.
4	1.3.1.9	The system shall have the capability for the authorized user to configure the list of mandatory fields for property characteristics based on business rules including but not limited to property type, neighborhood	Authorized user here is the Administrator	Must Have	This function may be performed via the User-Defined Coding structures and Data Validation Rules definitions.
4	1.3.1.10	The System shall provide the capability for authorized user to mass update parcel attributes for selected parcels (e.g. large developments) through multiple means including, but not limited to: a. Uploading an excel spreadsheet b. Selecting existing parcels and applying an entered change		Must Have	The batch update utility provides this functionality. Once spreadsheets are standardized,we will develop the utility to import them and make the required changes.
4	1.3.1.11	The System shall have the capability for the authorized user to update characteristics and values, individually or as a mass update (or delegate to other staff) including but not limited to: a. Property and improvement characteristics b. Situs address c. Use code d. Neighborhood e. District	The system shall also have the capability for the user to upload an excel spreadsheet from which the system should automatically update the characteristics/values	Must Have	This may be accomplished via the Workflow Subsystem.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.1.12	The System shall prompt authorized users to notify business personal property staff of relevant construction or personal property value allocations if applicable	The system shall prompt the user to notify Business Property staff to investigate and take action to pick up value. (Currently done thru Leasehold Communiques)	Must Have	This may be accomplished via the Workflow Subsystem.
4	1.3.1.13	The System shall have the capability for the authorized user to submit the values for Supervisor approval. The System shall also have the capability to send the values for a second level approval based on the pre-defined business rules	For e.g.: the System should workflow should direct the transaction for a second level approval by Deputy Assessor if the value is higher than a pre-configured threshold	Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4	1.3.1.14	The System shall provide authorized users with the ability to select and mass approve valuations based on different selection criteria including, but not limited to 1. User 2. Total value 3. Property Type 4. Activity Type	For e.g.: the supervisor should be able to mass approve the valuations of multiple parcels	Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4	1.3.1.15	The system shall identify and track properties that currently have a declined value	The system shall identify these properties based on Reason Code and Temporary Value The system shall have an option to generate a list of all the parcels that qualifies for Decline in Value with details	Must Have	This is accomplish via the User-Defined Coding Schema.
4	1.3.1.16	The System shall prompt the authorized user to review properties enrolled under the Decline in Value Assessment Program annually to determine if the property continues to be eligible for the program and make adjustments based on the result of the review		Must Have	Activities such as 'Decline in Value' may be set to automaticall rollover and thus, creating a Workflow line itme for the next roll year.
4	1.3.1.17	The system shall have the capability for the user to remove the temporary decline in value /adjust the temporary value based on the current market condition	Example:- Based on the current market conditions, the user should be able to remove/increase/decrease the temporary value for the previously declined value parcels. The system shall have the capability for the user to mass update these category of parcels based on certain criteria like property location, Year purchased etc.	Must Have	The proposed solution fully comports with this functional request.
4	1.3.1.18	The System shall have the ability for authorized users to indicate when a decline review results in no change to the assessed value	The user should be able to select a reason from the pre-defined list to indicate why the decision has been taken not to change the assessed value. The pre-defined reasons include but not limited to: 1. CIO due to transfer or sale after the lien date 2. Market value exceeds the factored base year value	Must Have	The proposed solution fully comports with this functional request.
4	1.3.1.19	The system shall have the ability to allow authorized users to enter a decline in value in the form of a roll correction when a 2nd review is done after the roll close	The system shall provide the capability for the authorized user to make changes to the values which should trigger a roll correction with supervisor approval	Must Have	The proposed solution fully comports with this functional request.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.1.20	The System shall calculate partial interest as selected by an authorized user	The partial interest is a % of a new market values added to a % of one or more previous base year values, factored. The partial interest calculation should be setup to check and make sure that the total interest adds up to 100%.	Must Have	Parial Interest scenarios are fully handled by this proposed solution
4	1.3.1.21	The System shall have the capability to calculate the values for new parcel(s) using the parent parcel(s) values according to preconfigured business rules	The parent parcels value should be distributed to the child parcels, including those ones that have effective date in the future, based on a square footage basis with the ability for the authorized user to override the allocation.	Must Have	This functionality is included in in the proposed system's Parcel Management utility and Assessment Processing.
4	1.3.1.22	The System shall provide authorized users with the ability to update the 100% override of the initial property value and perform allocation as necessary	The system should be able to allow authorized users to perform the override/reallocate the value, prior to finalizing the transaction.	Must Have	The proposed solution fully comports with this functional request.
4	1.3.1.23	The System shall have the capability to create activity/process/keep track of different kinds of claims including, but not limited to:		Must Have	This function is part of the Activity/Event Processing module of the proposed solution.
4		a. New construction or exclusion claim			Please see the response in 1.3.1.22 above
4		b. Transfer exclusion claim			Please see the response in 1.3.1.22 above
4		c. Undivided interest claim			Please see the response in 1.3.1.22 above
4		d. Solar exclusion claim			Please see the response in 1.3.1.22 above
4	1.3.1.24	The System shall have the capability to associate Residential/Commercial/Agricultural properties with one or more special categorization including but not limited to: Mello-Roos, Mills Act, Williamson Act, Possessory Interest, Open Space, Timberland, etc.	The system should be able to track the base years and temp values	Must Have	This function is accomplished via the 'User Defined Coding Schema'
4	1.3.1.25	The System shall have the capability to identify different types of restricted properties including but not limited to open space preserves, Taxable Government owned properties (Philips Factor), etc.		Must Have	The proposed solution fully comports with this functional request.
4	1.3.1.26	The System shall have the ability to associate a parcel/account with multiple exemptions and exemption-like qualifications (Williamson Act, Mills, etc.) applied to land sections and/or improvements	This applies to properties with institutional exemptions.	Must Have	A parcel may contain multiple Exemptions and Exemption-like qualifications within the Exemption Claims table/User Interface.
4	1.3.1.27	The System shall provide authorized users with the capability to identify Prop 58//60/90/110/193 transactions and to communicate the information securely to the BOE and other agencies as necessary	The system shall prompt the user to update the BOE report.	Must Have	Prop 58 and other like Transactions are tracked and a additional step in the process is included to collect the required information. This information may be communicated to other agencies such as the BOE as needed.
4	1.3.1.28	The System shall have the capability to identify properties under Unitary valuations by the BOE through interfaces with the BOE and other agencies	Unitary Property : Specific parcels like Pg&E, Rail road assessed by BOE 1. The System shall have the capability to upload the BOE given data file which contains the details of these Unitary Parcel. 2. Based on the BOE provided data, the system shall flag these properties	Must Have	This functional request will require the development of an API

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.1.29	The System shall have the capability for the authorized user to identify and maintain multiple parcels as one economic unit	Criteria to be considered multiple parcels as 'One Economic Unit' are: 1. Multiple Parcels but they should be contiguous 2. All the parcels are owned by the same owner 3. Historically all the parcels have been transferred together	Must Have	This function may be performed via the User-Defined Coding structures and the Economic Unit attribute on the Property Details view.
4	1.3.1.30	The system shall have the capability for the authorized user to flag sales that meets the Rule 2 of the Revenue and Taxation Code(a full market sale)	This flag indicates that this is a full market sale and can be used in the future as a comparable sale.	Must Have	The Recorded Document Processing/Logging utility defaults a Yes or No value into the Representative Sale Flag field based on the Property Type, Activity Code, District, and Neighborhood values. The user may override a No value for any given Sale event. When the document is then processed, a Sales History record will be created and flagged as a valid comparable sale.
4	1.3.1.31	The system shall have the capability to display the properties that are flagged as 'Full market Sale'(Rule 2 of the Revenue and Taxation Code) based on the criteria specified by the authorized users	Criteria includes, but not limited to Property Type(s),Date Range(s), District(s)/Neighborhood(s) These properties can be used as comparable sales.	Must Have	Please see the response in 1.3.1.30 above.
4	1.3.1.32	The system shall have the capability to display all the important information in a summary form based upon the user request(e.g.: displaying the Master screen and 'Land & Improvement Characteristics Screen', from any other screens) so that the user can review & validate the final values before the activity is marked as 'complete'		Must Have	This functional requirement will be addressed via user/role dashboard page.
3	**1.3.2**	**Building Permits**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.2.1	The System shall provide authorized users with the ability to scan, upload, and index building permits into the System	The building permits come from the Cities and County in different forms like Hard copy, Text/ Excel files that contain multiple permit information and actual Building Permit documents. The System shall have the capability for the authorized user to scan, upload, and index building permits into the document repository The system shall also interface with our document repository system(for e.g.: FileNet) and make the documents available for the users The indexing of the building permits needs to be done based on Parcel, Permit# and any other relevant field. Note: - Indexing by 'Requestor of the permit' may not be possible based on the review of Permit documents of multiple cities. Requestor of the Permit is not available on the permit document and the system will not be able to figure out automatically who the requestor is because the permit has owner name and contractor name and it's not explicitly stated who requested for the permit	Must Have	The proposed solution can import this information for the various cities issuing permits into the Activity Processing and Permit Detail tables.
4	1.3.2.2	The system shall have the capability to capture the key data elements from the permits and store in the system		Must Have	Please see the response in 1.3.2.1 above.
4	1.3.2.3	The System shall give the capability for the authorized user to flag permits that are linked to 'Calamities' and generate a calamity claim for the authorized user to send out.	E.g.: A new permit may be issued for a fire repair(Reason for the permit). Once the notice is sent out, the system should allow the user to set the status to 'Calamity Claim Sent' Note: - It may not be possible for the System to automatically flag a permit to indicate that it is linked to a calamity because the format of the permit document is not standardized across cities and it may be hard for the System to scan through the documents and find key words to arrive at a conclusion	Must Have	This functional request is performed via the Permit Workflow Processor and the underlying use of a 'mail merge' process in the proposed solution.
4	1.3.2.4	The System shall have the capability to flag any uploaded building permit that is associated with a retired APN so that the authorized user(Appraisal Support) can review and follow-up.		Must Have	This functional request is performed via the Permit Workflow Processor in the proposed solution.
4	1.3.2.5	The System shall have the capability to allow authorized user(Appraisal Support) to update activity status to "Not Assessable" for building permits that do not require reassessment.		Must Have	This functional request is performed via the Permit Workflow Processor in the proposed solution.
4	1.3.2.6	The System shall have the capability to identify and flag permits that require action including, but not limited to:	The identification is done based on the 'Type' of permit. The system shall also give the capability for the authorized user to change the classification	Must Have	The proposed solution has a Permit Screening utility that allow users to perform this task as well as determining assessability, work description, estimated value, potential calamity, and estimated completion dates.
4		a. Multiple permits for an individual parcel			Please see the response in 1.3.2.6 above
4		b. Construction			Please see the response in 1.3.2.6 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		c. Addition			Please see the response in 1.3.2.6 above
4		d. Alteration			Please see the response in 1.3.2.6 above
4		e. Repair			Please see the response in 1.3.2.6 above
4		f. Demolition			Please see the response in 1.3.2.6 above
4		g. Bay window			Please see the response in 1.3.2.6 above
4		h. Pools			Please see the response in 1.3.2.6 above
4		i. Solar			Please see the response in 1.3.2.6 above
3	**1.3.3**	**Construction (non-permit) discovery**			
4	1.3.3.1	The System shall provide authorized users with the ability to ~~record~~ input construction discovery from multiple means including, but not limited to:	The system should allow the user to input details mentioned in 1-5 and also allow the user to edit the information / cancel the event at a later point of time : 1. Event Type such as new construction/addition/remodel/calamity 2. Method of discovery 3. Date of discovery 4. Description of the event 5. Details of additional action required	Must Have	Construction Discovery and Permits may entered manually into the same module where the city permits are imported.
4		a. Driving around neighborhoods			Please see the response in 1.3.3.1 above
4		b. News articles and other media			Please see the response in 1.3.3.1 above
4		c. Inquiry from Broker, Fee Appraiser, or other Real Estate professionals due to inconsistent property characteristics			Please see the response in 1.3.3.1 above
4		d. Self-reporting and other public reporting			Please see the response in 1.3.3.1 above
4	1.3.3.2	The System shall provide the ability for authorized users to document findings from research activities in the System including, but not limited to:		Must Have	This request is part of the Permit & New Construction screen process in the proposed solution.
4		a. Validating that an existing permit matches the construction discovery information			Please see the response in 1.3.3.2 above
4		b. Documenting the information from forthcoming permits in the System			Please see the response in 1.3.3.2 above
4		c. Entering all relevant known information and flagging the record as non-permit activity if no permit has been issued			Please see the response in 1.3.3.2 above
4			Note -> Additional functionalities required for this category is covered under Construction Section - 1.3.11		
3	**1.3.4**	**Non-SFIA Possessory Interests (Special Properties)**			
4	1.3.4.1	The System shall have the capability for authorized users to update and maintain the data/information/forms related to Possessory Interest	For e.g.: The System shall have the capability for the authorized user to update : 1. the Cover Letter, templates of the PI Forms including headers(PI Usage Report, PI Supplemental Form etc.) , as required. 2. the parameters required for PI calculations 3. Agency data	Must Have	This function is part of the proposed solution.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.4.2	The System shall have the capability to generate and send the annual request forms related to Possessory Interest based on saved templates	The System shall generate 3 forms based on the saved templates: 1. Cover letter, 2. PI Usage Report (BOE 502-P) form 3. SMCA 502-P Supplemental Form (additional form to be completed if the number of lessees is higher than 4 or 5) The System shall send the letters electronically (via e-mail, if available) or via U.S. Mail Also need the ability for the authorized user to print letters/forms as needed, with updated information and for second mailings	Must Have	The management of the BOE 502-P report is managed in the proposed solution, the remaining function will delivered as a constituent working function of the final delivered System.
4	1.3.4.3	The System shall have the capability to automatically track & update and for the authorized user to track & update the status of receiving the PI Usage Report back	The system shall update the status of the agency record automatically, when the PI Usage Report is received back electronically.	Must Have	This function is an integral part of the proposed solution.
4	1.3.4.4	The System shall have the capability to send automatic reminders/prompt the predetermined user to manually contact Agencies that have not submitted completed forms by a preconfigured date		Must Have	This requested function is configurable through the proposed solution's Workflow sub-system.
4	1.3.4.5	The System shall have the capability to produce reports of all agencies that have not submitted the PI Usage form as on a date.		Must Have	This function is an integral part of the proposed solution.
4	1.3.4.6	The System shall have the capability to upload/update the information based on electronically submitted PI Usage Report (502 P)	For electronic upload, the system needs to search the Lessee information to determine if it already exists in the system or if it needs to create new record. The search criteria needs to be based on Lessee name or situs because Agencies usually do not know Lessee account numbers.	Must Have	This function is an integral part of the proposed solution.
4	1.3.4.7	The System shall have the capability for the authorized user to save the scanned documents and update the information for the lessees from the Agency-provided PI Usage Report (502 P)	For the PI Usage reports sent back non-electronically, need the ability for the authorized user to update information manually and also save the scanned documents into the System. For manual update, the System shall provide the ability for the authorized user to search by different criteria – 1st search by one of the three categories such as school, city or county/state/other agency. 2nd search by agency, such as a city (e.g.: San Carlos or school -Belmont Elementary School District.)	Must Have	This function is an integral part of the proposed solution.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.4.8	The System shall have the capability for the authorized user to create a new contact record for new or unreported lessees	The system shall provide the capability for the authorized user to create new Lessee records and input all the required information including but not limited to: owner name, dba, mailing address, situs address(with option to choose between mailing and situs addresses, if they are the same in order to auto-populate 2nd address), email address, telephone number, contact name, main code to determine type of account (PI - possessory interest, PIO - possessory interest only, PIE - possessory interest welfare exemption, BUS - business, etc.), TRA, corresponding APN, Lessor/agency name, BCC code, option to mark whether Business Property Statement (571-L) is required or not, exemption code and amount or percentage, Roll Code, remarks/notes, lease number, if available and the year the record is created so can see the initial year Lessee was a tenant/lessee. The System shall have the capability to do some basic validation for duplicate data to make sure that there is not a current record or old/inactive record for the same Lessees. Need to be able to customize account numbers for multiple locations under a parent company, such as location -01, location -02, location -03, etc. instead of just having random account numbers assigned.	Must Have	This function is an integral part of the proposed solution.
4	1.3.4.9	The system shall provide the capability for authorized users to alert/pass information to other assessessor staff when required.	E.g.: Need to be able to alert SFIA PI and Cable(eg:Comcast) PI appraisers when new lessee information related to these categories are submitted by the agencies in a common form	Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations.
4	1.3.4.10	The System shall have the capability to update the status to inactive for prior year lessees that were not reported on the current year PI form	Should be put into pending status until reviewed by authorized user, and the system shall provide an option to do a mass update the status for these types of accounts.	Should have	This functional request can be accomplished via the Batch Update Utilty of the proposed solution. However, additional first-hand analysis with the user might further reflect that some minor enhancement may be required in order to identify unreported forms.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.4.11	The System shall provide the capability for authorized users to review the lessee account status and confirm inactive status or reinstate the lessee record	The System shall provide the capability for authorized users to review the lessee account status and make updates including but not limited to : 1. confirm inactive status 2. Reinstate the lessee record status to Active 3. Update the Use Code to NB - no bill, SEC - assessed on Secured Roll, CITY or CO, etc. - city or county or any other government entity that is the lessee and therefore not assessable but was reported and data is for informational purposes only. Or falls into SFIA or Cable category - see those separate modules.	Must Have	This capability is provided through the Possessory Interest Lessee Information View of the proposed solution.
4	1.3.4.12	The System shall have the capability to check and ensure that all required factors, ratios, and values are updated in the System prior to performing valuation calculations for PI Accounts. The System shall have the capability to alert authorized users if key data is missing	For e.g.: Annual COLA factors need to be uploaded to system for all PI calculations to work.	Must Have	The Possessory Interest calculations require that all of the given values be present for the calculations to work. An exception report will list problem areas.
4	1.3.4.13	The System shall have the capability to alert authorized user(s) of any lease terms expiring prior to the next lien date, for PI Accounts		Must Have	This function is part of the Possessory Interest Lease Information View of the proposed solution.
4	1.3.4.14	The System shall have the capability to conduct the present value calculation based on preconfigured parameters when initiated by an authorized user	Ability to calculate automatically by system or manually for values or exemptions added after initial calculation update. Valuation	Must Have	Authorized user may perform a Present Worth Valuation in the proposed solution.
4	1.3.4.15	The System shall have the capability to display values and calculations for review including, but not limited to:	Also need to be able to review formulas to ensure they are working correctly	Must Have	In the proposed solution the Possessory Interest Valuations are stored in a Multi-Year table and all prior and current year details are available for review.
4		a. Current year calculations			Please see the response in 1.3.4.15 above
4		b. Current year values			Please see the response in 1.3.4.15 above
4		c. Prior year calculations			Please see the response in 1.3.4.15 above
4		d. Prior year values			Please see the response in 1.3.4.15 above
4		e. Highlighting any discrepancies			Please see the response in 1.3.4.15 above
3	**1.3.5**	**SFIA Possessory Interests (SP)**			
4	1.3.5.1	The System shall prompt the predetermined user to Update the SFIA possessory interest information at a preconfigured date including, but not limited to:	The system should be able to keep track of key trigger dates, when information needs to be updated for SFIA Possessory Interest calculations. Examples are listed in rows a-g	Must Have	This will require significant modification to the proposed solution and a comprehensive analysis of the applicable "Airport" PI requirements.
4		a. COLA factor table			Please see the response in 1.3.5.1 above
4		b. Airport expense rate			Please see the response in 1.3.5.1 above
4		c. Rates and charges table			Please see the response in 1.3.5.1 above
4		d. Cap rate adjustment			Please see the response in 1.3.5.1 above
4		e. Equipment table factor			Please see the response in 1.3.5.1 above
4		f. Quarterly cost factor			Please see the response in 1.3.5.1 above
4		g. Annual cost factor			Please see the response in 1.3.5.1 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.5.2	The System shall provide the capability to update and save all of the previous year information including, but not limited to:	The System shall be able to save the key pieces of information for each year.	Must Have	Please see the response in 1.3.5.1 above
4	1.3.5.3	a. retrieving SFIA rates and charges information from the SFIA contact or FLYSFO.com website	SFO Airport publishes Rate and Charges for each year. We refer to those rate and charges to see what the rental rate is for different categories of space, landing right fees. The document is available as .pdf on SFO Airport website. System does not need to retrieve the information, but if we have a database to input the relevant information from Rate and Charges document.	Must Have	Please see the response in 1.3.5.1 above
4	1.3.5.4	The System shall have the capability to calculate an annual assessment for relevant SFIA PI's based on pre-defined business rules at a preconfigured date	Once all the information and factors are updated in the System. System should be able to calculate PI assessment values. The System will take into consideration the following, including but not limited to: 1. Date of Value (DOV); 2. Lease Term; 3. Rental Rate; 4. Base Year Value; 5. Space Details; and 6. Multiple Base Years.	Must Have	This will require some first-hand analysis of the current “Airport” spreadsheet design and its underlying database framework. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.3.5.5	The System shall provide the capability for an authorized user to create a new SFIA PI account including, but not limited to:	The system should be able to create new accounts and also be able to do some validation on old expired or inactive accounts. System should be able to identify related accounts and create new accounts as	Must Have	Please see the response in 1.3.5.4 above
4		a. Scanning, uploading, and/or indexing any relevant documentation	System should be able to index all the relevant documentation and tie it to the account. Currently, we use FileNet to scan documents and tie to account.		Please see the response in 1.3.5.4 above
4		b. Entering all relevant information including, but not limited to:			Please see the response in 1.3.5.4 above
4		1. Base year	System should be able to keep track of base years and all changes due to space modifications.		Please see the response in 1.3.5.4 above
4		c. Calculating the base year value according to preconfigured business rules	This is very important and the key pain point. System should be able to keep track of base year and any modifications to it when the space is reduced over the term of the lease.		Please see the response in 1.3.5.4 above
4		d. Calculating the supplemental assessment according to preconfigured business rules	SFIA accounts frequently add or modify existing space. This results in multiple base years for a single account. The system should be able to issue and consolidate Supplementals with DOV's that are close.		Please see the response in 1.3.5.4 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.5.6	The System shall provide the capability for an authorized user to create a new construction event on an existing SFIA PI account including, but not limited to:	The System should be able to handle the addition and deletion of space to an existing account. This includes, setting up new base year values, modifying existing base year values, calculating resulting Supplementals, combining all these base year values to come with FBYV for lien date and then be able to compare it to Current Market value based on current rents and remaining term as of lien date. The system should be able to send out the official notifications.	Must Have	This will require some first-hand analysis of the current “Airport” PI requirements. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Scanning, uploading, and/or indexing any relevant documentation	System should be able to index and tie all documentation to the account.		Please see the response in 1.3.5.6 above
4		b. Entering all relevant information including, but not limited to:	System should provide capability to capture the following information and be able to keep track of multiple base years.		Please see the response in 1.3.5.6 above
4		1. Base year			Please see the response in 1.3.5.6 above
4		c. Calculating the base year for new construction according to preconfigured business rules	Amy new Lease/Permit addition, deletion or modification requires creation of a new BYV, modification of old BYV, Supplemental calculations, notifications. System should be able to handle all that trigger events.		Please see the response in 1.3.5.6 above
4		d. Calculating the supplemental assessment according to preconfigured business rules	System should be able to calculate the Supplementals based on the new BYV and last years assessed value.		Please see the response in 1.3.5.6 above
4	1.3.5.7	The System shall have the capability to calculate the assessment values based on the assessment type and preconfigured business rules	Calculations for Aviation and Concession Accounts is same. There is some variation in expense rates and LHI's. System should be able to handle these variations.	Must Have	Please see the response in 1.3.5.6 above
4	1.3.5.8	The System shall ensure that all prior activities are processed before an airport PI assessment can be completed	The System should keep track of all notification on new permits, additions, modifications. Such events should be processed (if before lien date) before Annual Assessment is calculated.	Must Have	Please see the response in 1.3.5.6 above
4	1.3.5.9	The System should be able to send out the notification letters		Must Have	Please see the response in 1.3.5.6 above
4		a. Official Supplemental notice (supplemental assessment only)	System should be able to generate official Supplemental Notices.		Please see the response in 1.3.5.6 above
4		b. Cover letter (supplemental assessment only)			Please see the response in 1.3.5.6 above
4		c. Assessment type	System should be able to capture and provide detail on type of PI account - Aviation, Concession, Landing Right		Please see the response in 1.3.5.6 above
4		d. Detailed calculations	The System should be able to provide a calculation details on how the total assessed value is calculated. The system should be able to pull information from different data points for the account and be able to present this information in report.		Please see the response in 1.3.5.6 above
4	1.3.5.10	The System shall have the capability to maintain inter-county pipeline right of way under possessory interest valuations	System should be able to maintain information related to Right of Way Accounts and be able to handle simple calculations to come with the assessment for such accounts. (5 such accounts)	Must Have	Please see the response in 1.3.5.6 above
3	**1.3.6**	**Landing Rights (SP)**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.6.1	The System shall prompt the predetermined user to request the landed-weight ranking report and update the RERC cap rate adjustment at a preconfigured date	The RERC cap rates used for the Landing Rights Assessment are published in the RERC reports. LA county circulates this Cap rates to all counties. System should have the capability to prompt the user to input this information once a year.	Must Have	This will require modification to the proposed and an analysis of the applicable "Airport Landing Rights" requirements.
4	1.3.6.2	The System shall provide the capability for authorized users to submit the SFIA request manually or through the System	Landing Rights assessment calculations are based on total landed wt. for each airline. We receive this request from Airport as Excel File.	Must Have	Please see the response in 1.3.6.1 above
4	1.3.6.3	The System shall have the capability to compare the updated landing rights information to previous information and identify any new or missing airlines	System should be able to identify any new Airlines that report landed wt. as per the Airport Report.	Must Have	Please see the response in 1.3.6.1 above
4	1.3.6.4	The System shall provide the capability for authorized users to create new accounts		Must Have	Please see the response in 1.3.6.1 above
4	1.3.6.5	The System shall provide the capability for authorized users to determine and select the status for missing airlines including, but not limited to:	Some Airlines, do not operate every year or Some Airlines stopped operating and we "inactivated" their account. When "New" Airline shows up on the report, System should be able to check on historical records before prompting to create a new account.	Must Have	Please see the response in 1.3.6.1 above
4		a. Current			Please see the response in 1.3.6.1 above
4		b. No bill			Please see the response in 1.3.6.1 above
4		c. Inactive			Please see the response in 1.3.6.1 above
4	1.3.6.6	The System shall have the capability to calculate the final PI values for each account and display the relevant information for review including, but not limited to:	Landing Right PI calculations are set of formulae. Once the information is updated on Landing Rights Cap Rate, Landed Wts., the system should be able to calculate the PI values and display for review.	Must Have	Please see the response in 1.3.6.1 above
4		a. Current year PI values	The System should be able to print "Assessment Summary" to be shared with tax payers. Most Airlines will request the working papers showing the calculation details for the assessment.		Please see the response in 1.3.6.1 above
4		b. Previous year PI values			Please see the response in 1.3.6.1 above
4		c. Current year PI value calculations			Please see the response in 1.3.6.1 above
4		d. Previous year PI value calculations			Please see the response in 1.3.6.1 above
4		e. Highlighting any differences between current and prior year values			Please see the response in 1.3.6.1 above
3	**1.3.7**	**Comcast PI (SP)**			
4	1.3.7.1	The System shall have the capability to send a request to Comcast for an updated report at a preconfigured date	The Franchise Fee information is requested from a contact at Comcast every year and we receive an Excel file for various Comcast Accounts.	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.3.7.2	The System shall calculate the final Comcast values for each account and display the relevant information for review including, but not limited to:	Once we have the information on Franchise fees, the PI calculations are straightforward and System should be a able to calculate the PI assessment based on the information entered.	Must Have	This will require some first-hand analysis of the current proposed PI module design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Current year Comcast values			This will require some first-hand analysis of the current proposed PI module design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		b. Previous year Comcast values			TThis will require some first-hand analysis of the current proposed PI module design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		c. Current year Comcast value calculations			This will require some first-hand analysis of the current proposed PI module design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		d. Previous year Comcast value calculations			This will require some first-hand analysis of the current proposed PI module design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.3.8**	**Residential CIO**			
4	1.3.8.1	The System shall have the capability to display any open/pending activities and the related documents of the specific parcel for authorized user review including, but not limited to:	The system should display all assessable and/or open events (sales, construction, partial splits, calamities, declines, death etc.) so that it can be an activity/event driven system. The system should highlight the pending events. The system shouldn't allow assessment events worked out of sequence. New construction/additions prior to sale should be flagged, but not necessarily hold up launching or processing the sale. The system should identify related or interdependent activities which may affect a base year enrollment.	Must Have	This function may be performed via the Workflow Subsystem of the proposed solution.
4		a. Property type			Please see the response in 1.3.8.1 above.
4		b. Ownership			Please see the response in 1.3.8.1 above.
4		c. Property and improvement characteristics			Please see the response in 1.3.8.1 above.
4		d. Situs address			Please see the response in 1.3.8.1 above.
4		e. Use code			Please see the response in 1.3.8.1 above.
4		f. Neighborhood			Please see the response in 1.3.8.1 above.
4		g. District			Please see the response in 1.3.8.1 above.
4		h. PCOR			Please see the response in 1.3.8.1 above.
4		i. DOV			Please see the response in 1.3.8.1 above.
4		j. Link to Grant Deed			Please see the response in 1.3.8.1 above.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.8.2	The System shall have the capability to calculate the initial land and improvement allocation based on preconfigured business rules	Initial land and improvement allocation varies based on use (condos, SFR) neighborhood (tract, complex etc.), location, etc. The appraiser should be able to preconfigure the allocation. The system will present the user with a range of value(s) for the land and or improvements and will calculate the corresponding balance allocated to either land or improvement based on the residual method. The system will also show other recently processed sales and their allocation for purposes of equalization. The system will store previously enrolled allocation ranges and will recall them based the date of value. The System shall also provide the capability for the authorized user to override the values	Must Have	The allocation of Land and Improvement is defined in the User-Defined Coding schema based on Use Code.
4	1.3.8.3	The System shall provide authorized users with the ability to review relevant information including, but not limited to:		Must Have	This requested function is all included in the Workflow Processing for Sale Activities in the proposed solution.
4		a. The allocation	Land and improvements		Please see the response in 1.3.8.3 above
4		b. Pending activities	E.g.: Construction		Please see the response in 1.3.8.3 above
4		c. Other findings	E.g.: Creative Financing/Cash equivalency, personal property details		Please see the response in 1.3.8.3 above
4	1.3.8.4	The System shall provide authorized users with the ability to verify and update improvement characteristics including, but not limited to:	The system should prompt the user to verify & update characteristics after new construction or non-assessable activities such as alteration.	Must Have	Please see the response in 1.3.8.3 above
4		a. Square footage	The system should clearly describe square footage of different types of building area (main unit vs. guest house, basement, finished basement, garage, carport etc.)		Please see the response in 1.3.8.3 above
4		b. Number and type of rooms	The system shall provide drop-down menus for common room types (bedrooms, dining, etc.)		Please see the response in 1.3.8.3 above
4		c. Effective age	The system shall prompt the user to update the effective after remodeling or new construction activities are processed or as appropriate from received data.		Please see the response in 1.3.8.3 above
4		d. Auxiliary buildings	The system should provide for the description of auxiliary buildings such as barns, detached garages or other structures other than the main improvement		Please see the response in 1.3.8.3 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		e. Improvement Attribute History	The system should create "tabbed snapshots" of the improvement screen that allow the appraiser to compare or track if changes though time have been made.		Property Characteristics contain an Effective and End Date. When changes are made to a property's characteristics, the system only updates the End Date on the existing record with the current date or a date selected by the user. Then, a new record is inserted containing the user's updates, and the Effective Date is set to the same value as the End Date on aforementioned characteristics record. The End Date on the newly inserted record is set to 12/31/9999. The 9999 year indicates it is active characteristics record. All other characteristics records for the account where the End Date Year is not equal to 9999 are considered inactive, but do represent the attribute's state for the timeframe defined by the Effective and End Dates.
4		f. Solar Panel	The system have the capability to store all the important improvement characteristics including, but not limited to Solar Panels and prompt the user to verify & update them after new construction or non-assessable activities such as alteration.		Please see the response in 1.3.8.3 above
4	1.3.8.5	The System shall provide authorized users with the ability to verify and update property attributes including, but not limited to:		Must Have	The proposed solution design fully comports with this functional request.
4		a. Situs Address			The proposed solution design fully comports with this functional request.
4		b. Use Code			The proposed solution design fully comports with this functional request.
4		c. Zoning			The proposed solution design fully comports with this functional request.
4		d. Districts/Neighborhoods			The proposed solution design fully comports with this functional request.
4	1.3.8.6	The System shall have the capability to generate and send requests for additional information from known affected parties as selected by an authorized user including, but not limited to:	The system should be able to keep track of the time the communications are sent and calendar to follow-up.	Must Have	This functional request is accomplished with the combination of the CIO Workflow processor and underlying 'mail merge' process in the proposed solution.
4		a. Residential Sales Questionnaire			Please see the response in 1.3.8.6 above
4		b. Change in Ownership Questionnaire			Please see the response in 1.3.8.6 above
4		c. Any other relevant information required by the authorized user			Please see the response in 1.3.8.6 above
3	**1.3.9**	**Construction**			
4	1.3.9..1	The System shall have the capability to display construction information including all open/pending activities for review including, but not limited to:		Must Have	This information is avaiable for viewing and updating by authorized users via the Permit Processing/Logging and Permit Detail Views in the proposed solution. Our Permit Logging Utility is based upon the CIO Workflow processor/Logging and functions in an extremely similar manner. We group New Contruction and Additions into a single processing utility and reffer to it as Permit Processing/Loggin.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. Property information	Including current and historical property characteristics		Please see the response in 1.3.9.1 above
4		b. Parcel history	Details of all the activities in which the parcel has been part of		Please see the response in 1.3.9.1 above
4		c. Real property construction including first generation tenant improvements			Please see the response in 1.3.9.1 above
4		d. Business property construction including fixtures and second generation tenant improvements			Please see the response in 1.3.9.1 above
4		e. Current permits			Please see the response in 1.3.9.1 above
4		f. Prior permits			Please see the response in 1.3.9.1 above
4		g. Party conducting the construction including, but not limited to:			Please see the response in 1.3.9.1 above
4		1. Applicant Name & Contact Information			
4		2. Applicant Type	If easily available from the permit (E.g. : Owner, Contractor, Tenant		Please see the response in 1.3.9.1 above
4		h. Construction Cost Questionnaire			Please see the response in 1.3.9.1 above
4		i. Construction status			Please see the response in 1.3.9.1 above
4	1.3.9..2	The System shall provide authorized users with the ability to document research including, but not limited to:		Must Have	Please see the response in 1.3.9.1 above
4		a. Conducting a field check	The system should enable the user to upload photos & put notes, as part of conducting field check		Please see the response in 1.3.9.1 above
4		b. Corresponding with the property owner			Please see the response in 1.3.9.1 above
4		c. Reviewing submitted plans			Please see the response in 1.3.9.1 above
4		d. Supporting integration with or prepopulating construction details into the Marshall & Swift cost estimator program		Could Have	This will require some first-hand analysis of the currently proposed design; i.e., implementaion of an API to interface with the Marshall & Swft cost estimator, however, this requested feature will be delivered as a constituent working function of the final delivered System.
4		e. BOE cost table			This data element will be provided via Integration with the BOE cost table.
4	1.3.9..3	The system shall have the ability to notify authorized users about any new construction related exclusion requests	The exclusion requests can be for Builder's exclusion, Disability exclusion etc.	Must Have	The Workflow Processing Utility updates the Permit/New Construction detials indicating an exclusion request has been submitted. Then, when an authorized user is processing the construction event, they will be notified about the exclusion request.
4	1.3.9..4	The system shall have the capability for the authorized user to flag properties with Builder's exclusion to indicate that it should be excluded from Supplemental assessment		Must Have	Please see the response in 1.3.9.1 above
4	1.3.9..5	The system shall have the capability for the authorized user to flag properties with exclusion(other than Builder's) to indicate that it should be excluded from assessment	The user shall be able to choose correct codes to indicate the type of exclusion that is applicable for the property	Must Have	Please see the response in 1.3.9.1 above
4	1.3.9..6	The system shall provide the authorized users with a list of cost per square foot for previously enrolled construction activities to help with cross-checking	The relevant construction can be determined based on configured elements such as neighborhood, property type etc.	Should Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.3.9..7	The System shall provide authorized users with the ability to record the final date of completion of the construction as DOV	This date is provided by the building department / the property owner/contractor via e-mail/phone/construction questionnaire	Must Have	Please see the response in 1.3.9.1 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.9..8	The System shall provide authorized users with the ability to track if construction is complete		Must Have	This is a user-defined status that may be associated with a Permit/New Contruction record.
4	1.3.9..9	The System shall provide authorized users with the ability to document and track the "percent complete" as of the 1/1 lien date for incomplete construction		Must Have	This is a value that may be associated with a Permit/New Contruction record.
4	1.3.9..10	The system shall have the capability to pre-populate the property characteristics and provide the ability for the user to review & correct them	The system should automatically display this information when you launch the construction related activity	Must Have	Please see the response in 1.3.9.1 above
4	1.3.9..11	The system shall have the capability to display the results so that the user can review & validate the final values before the activity is marked as 'complete'	The system should automatically display this screen when you launch the construction related activity	Must Have	The proposed solution requires the user to review the results of launching all Assessable Events before they are marked as complete.
4	1.3.9..12	The System shall have the capability to calculate the new value(s) after construction based on user provided values	E.g.: New Factored Value for the improvement is calculated as the current factored Base Year Value of the improvement + New Base Year value for improvement, if the construction is an addition. In the case of a totally new construction, the improvement gets a new Base Year and a new Base Year value	Must Have	The proposed solution design fully comports with this functional request.
3	**1.3.10**	**Processing New APN**			
4	1.3.10.1	The System shall have the ability to alert the authorized users if there are open activities on the parent parcels of the newly created APN	If a new APN is being created, the system should notify the user of any open activities	Must Have	This function is included in the Parcel Management (Split/Combine) module of the proposed solution.
4	1.3.10.2	The System shall provide authorized users with the ability to move open activities to new parcel(s) as appropriate		Must Have	Please see the response in 1.3.10.1 above
4	1.3.10.3	The System shall prevent authorized users from completing the new APN activities if there are open activities on the parent parcels of the newly created APN		Must Have	Please see the response in 1.3.10.1 above
4	1.3.10.4	The System shall have the capability to calculate the values for new parcel(s) using the parent parcel(s) values according to preconfigured business rules	The parent parcels value should be distributed to the child parcels, including those ones that have effective date in the future, based on a square footage basis with the ability for the authorized user to override the allocation.	Must Have	The proposed solution fully comports with this functional request.
4	1.3.10.5	The System shall provide authorized users with the capability to create/record interim parcels	An interim parcel is used for valuation purposes and is a necessity	Must Have	The proposed solution fully comports with this functional request.
4	1.3.10.6	The System shall provide the capability for the authorized users to access the GIS maps and the parcel maps	Authorized User here means the Appraisers	Must Have	The users will be able to access GIS and parcel maps for new and existing APNs from their Event Processing Workflow and an Account's Activity/Event Tracking via hyperlink
3	**1.3.11**	**Government CIO**			
4	1.3.11.1	The System shall provide authorized users with the ability to document any applicable exemption codes for a CIO involving a government buyer		Must Have	The proposed solution design fully comports with this functional request.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.11.2	The System shall have the capability to notify PI and business personal property(BPP) if there is a CIO involving a government buyer	The PI appraiser annually contacts government agencies/entities that lease out their properties to non-government/private tenants. These agencies report all PI to the PI appraiser. The System shall have the capability to notify PI and business personal property if there is a CIO involving a government buyer so that the PI appraiser can add, if necessary, the government agency/entity to the annual contact list. Though, usually the PI appraiser the Government property appraiser are the same person.	Could have	This requirement could be supported. The design and development team would like to garner more details related to this requirement in the negotiation or discovery period in order to meet or exceed client expectations.
4	1.3.11.3	The System shall have the capability to update the current assessment value to zero based on the date of sale by a government buyer		Must Have	The proposed solution fully comports with this functional request.
4	1.3.11.4	The System shall have the capability to save all values for historic purposes while maintaining the current assessed value as zero while a property is owned by the government		Must Have	The proposed solution fully comports with this functional request.
4	1.3.11.5	The System shall provide the capability for authorized users to confirm that the seller of a parcel is a government entity	When a government entity sells a property to a private entity the PI appraiser and business personal property (BPP) unit needs to be advised. The PI taxpayers' status needs to be updated as well as any involved BPP accounts. The exemption needs to be retired as of the sale date. The property needs to change district and neighborhood from the government category to the new district and neighborhood.	Must Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
3	**1.3.12**	**Commercial CIO**			
4			Please note that all the requirements listed under 'Residential CIO' section above is applicable to Commercial CIO also. The requirements listed here are the additional requirements for Commercial properties CIO.	Must Have	
4	1.3.12.1	The System shall have the capability to display any open/pending activities, the related documents and the related information of the specific commercial parcel for authorized user review including, but not limited to:	The system should also display any other relevant information submitted at the time of transfer.	Must Have	This is part of the CIO Document Workflow processor/logging. Any values not available directly from the processing/logging view may be accessed in a drilldown fashion.
4		a. Property type			Please see the response in 1.3.12.1 above
4		b. Ownership			Please see the response in 1.3.12.1 above
4		c. Property and improvement characteristics			Please see the response in 1.3.12.1 above
4		d. Situs address			Please see the response in 1.3.12.1 above
4		e. Use code			Please see the response in 1.3.12.1 above
4		f. Neighborhood			Please see the response in 1.3.12.1 above
4		g. District			Please see the response in 1.3.12.1 above
4		h. PCOR			Please see the response in 1.3.12.1 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		i. DOV			Please see the response in 1.3.12.1 above
4		j. Link to Grant Deed			Please see the response in 1.3.12.1 above
4	1.3.12.2	The System shall have the capability to generate and send requests for additional information from known affected parties as selected by an authorized user including, but not limited to:	The system should be able to keep track of the time the communications are sent and calendar to follow-up.	Must Have	This function will be accomplished via a 'mail merge' process in the proposed solution
4		a. Commercial Sales Questionnaire			Please see the response in 1.3.12.2 above
4		b. Change in Ownership Questionnaire			Please see the response in 1.3.12.2 above
4		c. Income and expense statements			Please see the response in 1.3.12.2 above
4		d. Rent rolls			Please see the response in 1.3.12.2 above
4		e. Any other relevant information required by the authorized user			Please see the response in 1.3.12.2 above
3	**1.3.13**	**Prop 60/90/110/58/193**			
4	1.3.13.1	The System shall provide authorized users(appraisers) with the ability to review proposition 60/90/110/58/193/any other exclusion applications for base year value transfer, and mark whether qualification requirements are met including, but not limited to:	A review process/checklist should be provided to check that all requirements are met. If not, a letter should be generated to send to the applicant outlining the requirements not met.	Must Have	This functionality is provided via the proposed design for the Prop 60/90/110/58/193 tracking module as it relates to the proposed solution
4		a. Value requirements	Purchase price and/or construction value must meet all time/value criteria	Must Have	Please see the response in 1.3.13.1.a above
4		b. Property type	The original and replacement property must be the principle residence or qualify for the HO exclusion	Must Have	Please see the response in 1.3.13.1.a above
4	1.3.13.2	The System shall provide the capability for authorized users(appraisers) to transfer the base value for approved prop 60,90,110,58,193 and other qualified parcels	The user should be able to transfer the appropriate Factored Base Year Value from any original property to the replacement property	Must Have	Please see the response in 1.3.13.1.a above
4	1.3.13.3	The System shall provide authorized users with the ability to document and save new/effective base values. The authorized user also should have the ability to override the existing values.		Must Have	Please see the response in 1.3.13.1.a above
3	**1.3.14**	**Williamson Act and TPZ Sales and Supplemental (SP)**			
4	1.3.14.1	The system shall have the capability to generate the Agricultural Preserve Surveys based on saved templates annually and send out to all Williamson Act Property owners including Government owned properties	Williamson Act properties are identified based on the below codes: 1. Use Code - 44 & 45 2. District 7 (Neighborhood 71A, 71C, 71G, 71N) Note :- The Surveys are sent out only to WA Property owners. For TPZ properties, we do not send out Surveys	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.3.14.2	The System shall have the capability to capture multiple land/improvement use details for WA/TPZ Properties		Must Have	The proposed solution design fully comports with this functional request.
4	1.3.14.3	The System shall provide authorized users with the ability to process new Williamson Act/TPZ properties and Williamson Act/TPZ property purchases as preconfigured in the System including, but not limited to processing by:	For properties under Williamson Act/TPZ, the system should be able to display the Williamson Act/TPZ restricted values and also keep track of base years. For land we need to keep track of base year value of land, homesite(land) base year and Annual Williamson Act/TPZ restricted Value and the system should be able to handle these three fields for land value. This is a special requirement for Williamson Act/TPZ properties	Must Have	This function is provided via Workflow and the Assessment Calculation modules of the proposed solution.
4		a. Use code			Please see the response in 1.3.14.3 above
4		b. District			Please see the response in 1.3.14.3 above
4		c. Neighborhood			Please see the response in 1.3.14.3 above

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.14.4	The System shall have the capability to display relevant Williamson Act/TPZ information for review including, but not limited to:	The system should display all pending activities just like any other parcel.	Must Have	A view to consolidate the various details would have to be developed for the proposed solution
4		a. Open permits			Please see the response in 1.3.14.4
4	1.3.14.5	The System shall have the capability to evaluate if the parcel(s) contains an improvement	System should be able to identify if Williamson Act parcel/TPZ has improvements on restricted land. For Williamson Act/TPZ properties, Supplementals are issued only on unrestricted portions of the land and all improvements.	Must Have	Please see the response in 1.3.14.4
4	1.3.14.6	If the parcel does not contain an improvement, the System shall have the capability to remove the land supplemental from the parcel according to preconfigured business rules	The System should be able to handle the Supplemental processing for Williamson Act/TPZ properties. For Williamson Act/TPZ, Supplementals are issued only on unrestricted portions of the land and all improvements. No Supplementals are issued when there is only Vacant Land(in this case there is only Restricted property)	Must Have	An authorized staff member has the ability to remove or suspend erollment of a supplemental on a Vacant Lot via the Assessment Status Code in the proposed solution.
4	1.3.14.7	If the parcel contains an improvement, the System shall have the capability to calculate the home site supplemental and improvement supplemental according to preconfigured business rules		Must Have	This function is designed as a constituent element of the Assessmet Calculations design as it relates to this aspect of the proposed solution.
4	1.3.14.8	The System shall have the capability to display relevant Williamson Act/TPZ data and calculations for review including, but not limited to:	The Assessor system should be able to capture the following data points for the Williamson Act/TPZ properties. Even though the valuation is handled outside the system, the system should be capable of capturing the listed data points.	Must Have	A view to consolidate the various details would have to be developed for the proposed solution
4		a. Base year			Please see the response in 1.3.14.8
4		b. Base year values			Please see the response in 1.3.14.8
4		c. Home site base year			Please see the response in 1.3.14.8
4		d. Home site base year values			Please see the response in 1.3.14.8
4		e. Home site supplemental (if applicable)			Please see the response in 1.3.14.8
4		f. Improvement supplemental (if applicable)			Please see the response in 1.3.14.8
4		g. Land supplemental (if applicable)			Please see the response in 1.3.14.8
4		h. Restricted land value			Please see the response in 1.3.14.8
4		i. Existing assessment			The proposed solution fully comports with this functional request.
4		j. Year to start countdown (currently 10 years for Williamson Act/TPZ and 9 years for non-renewal)	The system should be able to identify if a property is in the Non-Renewal process. System should be able to capture the 10 year countdown cycle and flag for a Use Code / Neighborhood Change once the 10 year count down is over.		This functional request will require require some first-hand analysis of the currently proposed solution for this aspect of the final solution to be delivered, i.e., the addition of Williamson Act information as an integrated segment of the Change in Ownership Processor and View. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		k. Remaining term of the non-renewal contract			Please see the response in 1.3.14.8

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.14.9	The System shall have the capability to retain the restricted land value until the successive lien date regardless of change in ownership or sale	Williamson Act/TPZ Values are calculated for restricted land portions. Improvements and homesites are not restricted. Williamson Act/TPZ values are placed on the property each lien date and should stay on even if the property sells. Homesite and Improvement values may change and Supplementals issued on those portions.	Must Have	The proposed solution design is able to maintain multiple base year values via the Value History tables
4	1.3.14.10	The System shall provide the capability for authorized users to remove the Williamson Act/TPZ status from the parcel	The system should be able to flag the user as the non-renewal cycle runs out.	Must Have	This functional request will require require some first-hand analysis of the currently proposed solution for this aspect of the final solution to be delivered, i.e., the addition of Williamson Act information as an integrated segment of the Change in Ownership Processor and View. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.3.14.11	The system shall have the capability for the user to input the values from the valuation process	The original requirement is for the valuation system. So delete Values include Base values, Final assessed Values	Must Have	The proposed solution design fully comports with this functional request.
4	1.3.14.12	The system shall have the capability to generate a notice (based on saved templates) to be sent out to Williamson Act/TPZ property owners when ever there is a change in Ownership & the whole property is restricted.	When the whole property is restricted, there is no supplemental notice sent out but the system should generate a notice to be send out to let the owner know of their base year value etc.	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
3	**1.3.15**	**Mills Act (SP)**			
4	1.3.15.1	The system shall have the capability for the user to input the values from the valuation process	Values include but not limited to Base values, Final assessed Values, Any portions that are not restricted by Mills Act etc. The System should support inputting and saving values at the Tracking Parcel level for the Mills Act properties in order to distinguish any portion that are not eligible for Mills Act benefits	Must Have	The proposed solution design allows multiple sets of Land and Improvement, Land, and/or Improvement values that server to establish base year values and assessed values. Additionally, values may be inputted strictly for tracking purposes. Moreover, Mills Act properties with virtually any number of valuations and values are fully supported in the currently proposed design.
4	1.3.15.2	The System shall have the capability to calculate the assessment values based on the following, which includes but is not limited to: a. Market Rents for Similar Properties; b. Owner-Occupied or Non-Owner Occupied; c. BOE Rates for Historical Properties.		Must Have	Please see the response in 1.3.15.1 above.
3	**1.3.16**	**California Water (SP)**			
4	1.3.16.1	The system shall have the capability for the user to input the values from the valuation process	Cal Water company sends an estimate of the values of the properties and the assessor team relies on these values. So the system has to provide the capability for the users to upload/input the final values into the assessment system	Must Have	Again, the proposed solution design allows multiple sets of Land and Improvement, Land, and/or Improvement values that server to establish base year values and assessed values.California Water (SP) property and associated valuations are fully supported.
3	**1.3.17**	**Gas/Mine & Mineral (SP)**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.17.1	The system shall have the capability for the user to input the values from the valuation process		Must Have	The proposed solution design allows multiple sets of Land and Improvement, Land, and/or Improvement values that server to establish base year values and assessed values. Gas, Mine and Mineral values are fully supported.
4	1.3.17.2	The system shall have the capability to generate letters/notifications (based on saved templates) to be sent out annually to property owners requesting information	The templates are based on the below BOE forms: 1. Oil and Gas Operating Expense Data Report 2. Oil and Dissolved Gas Production Report 3. Oil, Gas, Geothermal Personal Property Statement 4. Aggregate Production Report. Example for the information requested is Type of Mineral The system shall have the capability to interface with document repository to access the templates & forms	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution.
3	**1.3.18**	**Mobile Home Assessment**	**These requirements are for the Mobile Homes that are NOT on a permanent foundation and is on the Unsecured Roll**		
4	1.3.18.1	The system shall have the capability to upload the data that is sent by the state(HCD - Housing Community Development) for Mobile Homes	Data comes to us in the form of PDF files/Excel file	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.3.18.2	The System shall have the capability for the authorized user to review the state provided data and locate & verify the corresponding APN in the System		Must Have	The proposed solution fully comports with this functional request.
4	1.3.18.3	The System shall have the capability for the authorized user to create new APN by providing the following information including but not limited to: a. Parcel Number b. Tax Rate Area c. Situs Address d. Decal Number e. File Number f. Any relevant file/document reference number	The information required will be provided to the system via: 1. data entry by the authorized user or 2. by providing a reference to the scanned document that the system needs to use to extract the required data	Must Have	This range of functions is included in in the proposed system Parcel Management and Activity Processing Utilities for option 1. However, Option 2 will require some first-hand analysis of the current proposed Parcel Management design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.3.18.4	When the authorized user creates a new APN, the System shall notify the Mapping Team for review and approval of the new APN		Must Have	his functional request is supported via the Workflow Subsystem of the proposed solution design.
4	1.3.18.5	The System shall have the capability for the authorized user to request for retiring an existing APN		Must Have	This range of functions is included in in the proposed system Parcel Management Utility design.
4	1.3.18.6	When the authorized user initiates an APN retirement request, the System shall direct the activity to the Mapping Team for review and action		Must Have	his functional request is supported via the Workflow Subsystem of the proposed solution.
4	1.3.18.7	The System shall have the capability to determine whether the parcel should be exempt from assessment based on pre-configured base year value limits and flag it	A mobile home can be exempt from assessment if it has a low value(currently $7500)	Must Have	The proposed solution design fully comports with this functional request.
4	1.3.18.8	The System shall have the capability for the authorized user to create new workflow event for the mobile home to initiate the assessment process		Must Have	The proposed solution design fully comports with this functional request.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.18.9	The System shall have the capability for the authorized user to enroll the value into the system		Must Have	This range of functions is included in in the proposed system's Workflow Subsystem and Assessment Processing design.
3	**1.3.19**	**Direct Enrollment**			
4	1.3.19.1	The System shall have the capability to create a DE activity based on defined criteria and allocate the values to Land & Improvement	Criteria: 1. Residential Sales(Use Code 01, 97,98) 2. No open activities other than 'Decline' & 'Calamities' 3. Certain Neighborhoods 4. Positive supplemental Net 5. Single Parcel only 6. …….etc. The authorized user should have the capability to override the values	Must Have	The proposed solution design fully comports with this functional request.
4	1.3.19.2	The System shall have the capability to notify any designated users of the direct enrollment activity	The system should alert the user about the items that require an action from her/him	Must Have	Assessments that are classified as 'Direct Enrollment' are coded as such and notifcation will be preformed via the Workflow Subsystem in the proposed solution
4	1.3.19.3	The System shall provide authorized users with the ability to review and update -Direct Enrollment parcel assessment information including, but not limited to:		Must Have	This functional request will require some minor modification to the proposed solution design, i.e., develop a view of direct enrollment parcels. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Information related to confirming meeting of DE criteria including, but not limited to:			Please see the response in 1.3.19.3
4		1. Open market sale			Please see the response in 1.3.19.3
4		2. No known relation between grantor and grantee			Please see the response in 1.3.19.3
4		3. Single family residences, condos, or townhomes			Please see the response in 1.3.19.3
4		4. 100% transaction			Please see the response in 1.3.19.3
4		b. Assessment valuation allocation between land and improvement based on preconfigured business rules	Override capability to preset Land & Improvement values		Please see the response in 1.3.19.3
4		c. Market value in comparison to range identified based on preconfigured business rules			Please see the response in 1.3.19.3
4	1.3.19.4	If the System generated land/improvement values are adjusted, the System shall have the capability to verify that the new total value matches the sales price	If the values does not match, the appraiser should have the option to : 1. Correct the values and proceed OR 2. Remove assessments from the direct enrollment and route them for full appraisal review	Must Have	This range of functions is included in in the proposed system's Workflow Subsystem and Assessment Processing design.
3	**1.3.20**	**Real Property Valuation Approval and Enrollment**			
4	1.3.20.1	The System shall provide authorized users with the capability to view all activities and select based on multiple parameters including, but not limited to:		Must Have	This comprehensive function is included in the Workflow and Activity Processing modules of the proposed solution design.
4		a. Work type			Please see the response in 1.3.20.1
4		b. Appraiser/s			Please see the response in 1.3.20.1
4		c. Date Range			Please see the response in 1.3.20.1
4		d. Priority of activity			Please see the response in 1.3.20.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.20.2	The System shall have the capability to automatically conduct a reasonability check of values and notify the authorized user of any issues, based on business rules including, but not limited to:		Must Have	Some of the business rules for this request will have to incorporated into the proposed Activity Processing module design as it relates to the proposed solution. Nevertheless, this requested comprehensive feature will be delivered as a constituent working function of the final delivered System.
4		a. Value thresholds			All ready present in the proposed solution
4		b. Variance/deviance from previous values			All ready present in the proposed solution
4		c. Event type			All ready present in the proposed solution
4		d. Property type			All ready present in the proposed solution
4		e. Negative Supplemental			All ready present in the proposed solution
4	1.3.20.3	The System shall have the capability to display the results of the valuation/assessment for preview	This should include changes to the open roll, supplemental roll, escapes and roll corrections	Must Have	This functional request is accomplished in the proposed Event Processing Utility design. In this instance, when an activity is launched from the Event Processing utility, a Confirmation window would be displayed for the user detailing the changes that will be made if approved.
4	1.3.20.4	The System shall have the capability for the authorized user to edit the values after preview and before submitting for approval		Must Have	If the values in the Confirmation Window do not match the user's expected result, they are able to select an option to "Go Back" and make the necessary changes before attempting to Launch the event again.
4	1.3.20.5	The System shall have the capability for the authorized user to submit the values for Supervisor approval		Must Have	If the values in the Confirmation Window agree with the user's expected results, they simply select the option to Approve and the event is then promoted to the next step in the Workflow chain design.
4	1.3.20.6	The System shall provide authorized users with the ability to review/comment/cancel individual valuation/assessment or to mass approve valuation/assessment	The authorized user here is Supervisor	Must Have	Activities that would be launched from proposed Event Processing design would be subsequently approved by the initiating user which would also be set to be reviewed by their supervisor. The supervisors' Workflow lists the aforementioned activities for all of the appraisers assigned to them and pending their approval. Supervisors would be able to filter and sort their list for specific appraisers, activity types, value amounts, changes in value, and property type. Once they have their list filtered and sorted as desired, they would be able to select all line items and approve them in a handful of mouse clicks and/or key presses. Additionally, the current design would be able to drill down to review all of the details, and approve on an account by account basis.
4	1.3.20.7	The System shall have the capability for the Supervisor to send back(including notification) the activity to the originator, if the valuation/assessment need to be corrected based on the review		Must Have	Activities where the Supervisor notices problems or does not approve of 1 or more of the details/claims may be flagged for return to originating user to make the requested corrections.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.3.20.8	The System shall provide authorized users with the ability to edit pre-enrolled values with required documentation including, but not limited to:	The authorized user here is Supervisor	Must Have	As currently design, authorized user would be able toedit values that have not been enrolled.
4		a. Reason for the change			Please see the response in 1.3.20.7
4		b. Additional comments			Please see the response in 1.3.20.7
4	1.3.20.9	The System shall have the capability to notify originating assessor staff & supervisor, of value modifications and documentation of the reasoning		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.3.20.10	The System shall have the capability to release approved valuations/assessment to the appropriate roll	Roll includes Supplemental , Annual & Corrections	Must Have	The proposed solution design will fully comport with this request.
4	1.3.20.11	The System shall have the capability for the authorized user to change the values anytime before it is released to the controller		Must Have	This is basically the same functional requsted as 1.3.20.8. The combination of a user's or user's group access level and the processing level associated with assessments prior to released to the controller will allow for the county to be able to define this without input from the system supporters or developers.
2	**1.4**	**Exemptions**			
3	**1.4.1**	**Homeowner's Exemption Filing**			
4	1.4.1.1	The System shall have the capability to identify late applications and apply late fees and/or calculate partial exemption (currently, late applicants receive 80% of the exemption) according to preconfigured business rules including, but not limited to:	The base dates to identify late applications : 1. For Annual Filing : - On or before Feb 15 -> 100% - Between Feb 16 - Dec 10 -> 80% - After Dec 10 -> 0% 2. For Supplemental Filing : - 30 days from the notice date of the supplemental -> 100% - After 30 days but before delinquent date of first installment of supplemental bill -> 80% In addition to the above, the system needs to verify that the below condition is also satisfied. - the owner moved in within 90 days of Change in Ownership or completion of construction	Must Have	The requested functionality will be delivered as a constituent working function of the final delivered System.
4		a. Date that property owner occupied the property			This function is part of the details stored for Exemptions in the proposed solution design.
4		b. Date that property owner filed the exemption request			This function is part of the details stored for Exemptions in the proposed solution design.
4		c. Date that property owner assumed ownership of the property			This function is part of the details stored for Exemptions in the proposed solution design.
4	1.4.1.2	The System shall provide the capability for authorized users to input necessary values so that the system can calculate effective exemption values to each prior affected year, if applicable		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.1.3	The System shall provide the capability for authorized users to add, edit, or delete the proposed penalties, fees, or calculations associated with a homeowners' exemption		Must Have	Authorized users will have the ability to override the system calculated exempt amounts if needed in the proposed solution design.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.1.4	The System shall have the capability to apply homeowners' exemptions to multiple property types including, but not limited to:	The business Rules for all types of property are the same for a single exemption claim - For Multiplex homes, in order to claim more than one exemptions, each unit has to be owner occupied.	Must Have	The property type for which Homeowner's exemptions may be applied is in a user-defined code table in the proposed solution design.
4		a. Single Family Homes/Condominiums/Co-ops			Please see the response in 1.4.1.4
4		b. Boats			Please see the response in 1.4.1.4
4		c. Cabins			Please see the response in 1.4.1.4
4		d. Mobile homes			Please see the response in 1.4.1.4
4		e. Multi-plex Homes	E.g. : Duplexes/Tri-plex/Four-plex		Please see the response in 1.4.1.4
4	1.4.1.5	The System shall have the capability for the authorized user to deactivate or reinstate a prior Homeowner's Exemption		Must Have	The proposed solution design fully comports with this functional request.
3	**1.4.2**	**Multiple Claims**			
4	1.4.2.1	The System shall have the capability for the authorized user to upload multiple claim files from BOE	In a Roll year, BOE provides claim exception listings(Multiple Claim (MCL) files) that indicates the duplicate claims/error , 3 times.	Must Have	The proposed utility design to upload the BOE Multiple Claims listing would will require some first-hand analysis of the current proposed request in order to change the exemption status. However, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.4.2.2	The system shall have the capability to flag the records as exceptions based on the information uploaded to the system from the BOE files and generate a report for the users to review and then update the flag to the required value, based on the findings during the review.	The records should be flagged appropriately based on different criteria as below : 1. Different owner name 2. Different SSN for the same APN	Must Have	The proposed utility design to upload and update exemption records with a file provided by BOE will require some irst-hand analysis of the current proposed request in order to change the exemption status. However, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.4.2.3	The System shall generate, prepopulate, and send multiple claims correspondence from saved templates as selected by an authorized user including, but not limited to:	The system should interface with the document repository to access the saved template for the letter	Must Have	This functional request is designed to be performed via the underlying use of a 'mail merge' process in the proposed solution design.
4		a. "multiple claim" notifications	This notification letter should be generated for all the records that are identified as Exceptions(in 1.4.2.2)		Please see the response in 1.4.2.3
4		b. "multiple claim issue" resolved explanation to other Counties, individually			Please see the response in 1.4.2.3
4	1.4.2.4	The system shall have the capability to display the scanned documents from the document repository so that the authorized user can update the system based on the information in the document, for issue resolution	The system should interface with the document repository	Must Have	This functional request will require a minor amount of first-hand analysis, design modification such that the proposed solution design will meet the unique requirements of the county's Document Repository. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.4.2.5	The System shall provide the ability for the authorized user to update the property owner record with appropriate status		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.2.6	The System shall generate multiple claims list (MCL) for the authorized user to review and send to BOE		Must Have	Please see the response in 1.4.2.3
3	**1.4.3**	**Disabled Veterans**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.3.1	The System shall provide the capability for an authorized user to select missing supporting documents from a list of required documents and generate a letter based on the saved templates	The system shall have the capability to interface with the document repository to access the templates	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution design.
4	1.4.3.2	The System shall have the capability to display application information for an authorized user to determine if a disabled veteran qualifies for disabled veterans' exemption including, but not limited to:		Must Have	This is part of the details stored for Exemption claims in the proposed solution design.
4		b. VA letter			Please see the response in 1.4.3.2
4		c. DD-214 with honorable discharge			Please see the response in 1.4.3.2
4		d. Income form worksheet			Please see the response in 1.4.3.2
4		e. State Board form			Please see the response in 1.4.3.2
4		f. Income level qualifications			Please see the response in 1.4.3.2
4		g. Marriage certificate if applicable			Please see the response in 1.4.3.2
4		h. Death certificate if applicable			Please see the response in 1.4.3.2
4	1.4.3.3	The System shall have the capability to capture and save multiple levels of income level qualifications including, but not limited to:	The system shall provide the capability to the authorized user to input the BOE threshold	Must Have	Income threshold levels are stored in a user-defined coding schema in the proposed solution design.
4		a. Basic Exemption for income greater than or equal to a preconfigured threshold value for the given year as set by the BOE			Please see the response in 1.4.3.3
4		b. Low-Income Exemption value for income less than a preconfigured threshold value for the given year as set by the BOE			Please see the response in 1.4.3.3
4	1.4.3.4	The System shall provide the capability for authorized users to modify the preconfigured threshold values for disabled veterans' exemptions		Must Have	Please see the response in 1.4.3.3
4	1.4.3.5	The System shall have the capability to calculate and display disabled veterans' information for authorized user review including, but not limited to:		Must Have	This is part of the Exemption Claim record and Exemption Calculation Utility of the proposed soluton.
4		a. The disabled veterans' number of benefit-eligible days			Please see the response in 1.4.3.5
4		b. The disabled veterans' total benefit amount as calculated based on data including, but not limited to:			Please see the response in 1.4.3.5
4		1. Filing date			Please see the response in 1.4.3.5
4		2. Qualification date			Please see the response in 1.4.3.5
4		3. Date on the effective date letter from the VA to determine timely filing			Please see the response in 1.4.3.5
4		c. The effects of removing any homeowners' exemptions from the disabled veterans' account for all prior applicable years and applying the disabled veteran exemption for all applicable years			Please see the response in 1.4.3.5
4	1.4.3.6	The System shall create/maintain configurable rules about overlapping exemptions that can or cannot be held by an individual parcel and/or owning entity		Must Have	The stated rules are currently part of the exemption calculation design for the proposed solution design. Additionally, it is envisioned that the final design would have to modified so they are defined in the table coding schema of the proposed solution design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.4.3.7	The System shall have the capability to calculate and display for preview, the results of the indicated exemption including, but not limited to:	This should include changes to the open roll, supplemental roll, escapes and roll corrections	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Partial qualifications, if applicable			Please see the response in 1.4.3.5
4		b. Full qualifications			Please see the response in 1.4.3.5
4	1.4.3.8	The System shall have the capability to apply all approved calculations to the indicated property record for the indicated roll year(s)		Must Have	Please see the response in 1.4.3.5

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.3.9	For the Disabled Veteran's exemption that goes beyond the statute of limitation for roll correction, the System shall have the capability to generate a report with details of the exemption	Statute of limitation currently is 4 years, as per the Notice from BOE published on April 8, 2015 about filing Disabled Veteran's Exemption : BOE-261-G : "Section 4831 pertaining to roll corrections allows the assessor to correct the roll only if the correction is made within four years after the making of the assessment"	Must Have	THis will be included in the proposed system. The business rules can be modified to reflect the record date or the created date of the exemption before the timer starts ticking on the statute of limitations.
4	1.4.3.10	The System shall generate, prepopulate, and send disabled veterans' correspondence from saved templates as selected by an authorized user including, but not limited to:	The system should interface with the document repository to access the saved templates	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution design.
4		a. Missing required additional information notice			Please see the response in 1.4.3.10
4		b. Ineligible/Does not qualify notice			Please see the response in 1.4.3.10
4		c. Benefits explanation notice			Please see the response in 1.4.3.10
4		d. Annual low-income eligibility			Please see the response in 1.4.3.10
4		e. Change of eligibility notice			Please see the response in 1.4.3.10
3	**1.4.4**	**Historic Aircraft Initiation**			
4	1.4.4.1	The System shall automatically generate a list of current year historic aircraft exemptions according to a preconfigured schedule	The list should be generated by Dec 1st based on the existing active historic aircraft list and should be used as a starting point for next year	Must Have	Please see the response in 1.4.4.2
4	1.4.4.2	The System shall generate, prepopulate, and send(electronically/snail mail) historic aircraft correspondence from saved templates including, but not limited to:	The system shall interface with the document repository to retrieve the templates	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution design.
4		a. "historic aircraft exemption form" and a letter to all historic aircraft owners	The form should be mailed out by Dec 20th and receive back by Feb 15th of next year. The system should have the capability to interface with the document repository to retrieve the below templates: 1. Cover Letter 2. Historic Aircraft exemption form - BOE-260-B (P1) REV. 13 (06-11) 3. The form to indicate the details of the Historic Aircraft Public Display		Please see the response in 1.4.4.2
4		b. "Museum aircraft exemption form" and a letter to all Museum aircraft owners	The form should be mailed out by Dec 20th and receive back by Feb 15th of next year. The system should have the capability to interface with the document repository to retrieve the below templates: 1. Cover Letter 2. Museum Aircraft exemption form - BOE-260-A (P1) REV. 09 (06-11) Note:-> There are no Museum Aircrafts within the San Mateo County currently but we need this functionality in the System for future benefit		Please see the response in 1.4.4.2
3	**1.4.5**	**4% Commercial Fishing initiation**			
4	1.4.5.1	The System shall automatically generate a proposed list for current year commercial fishing exemptions according to a preconfigured schedule	Schedule - This list should be generated in the beginning of January every year	Must Have	Please see the response in 1.4.4.2

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.5.2	The System shall have the capability to compare prior and current year 4% commercial fishing property owners and identify new accounts		Must Have	Please see the response in 1.4.4.2
4	1.4.5.3	The System shall have the capability to generate, prepopulate, and send commercial fishing exemption initial correspondence from saved templates including, but not limited to:	The system should interface with document repository(Office / State repository) to access the templates.	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution design
4		a. "Boat-09-364" County questionnaire and cover letter to new vessel accounts	BOAT-09-364		Please see the response in 1.4.4.3
4		b. "4% assessment of commercial fishing BOE form" to all qualifying vessel accounts	BOE-576 E for Boats		Please see the response in 1.4.4.3
3	**1.4.6**	**Historic Aircraft Exemption**			
4	1.4.6.1	The System shall auto-generate a new account number(if none exists for that Aircraft) based on pre-defined business rules, once a property owner has submitted aircraft reference information in the Web Portal		Should Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.4.6.2	The System shall have the capability to display claim information for an authorized user to determine if an owner qualifies for a historic aircraft exemption including, but not limited to:		Must Have	This information is part of the proposed Exemption Claim Record design and would be accessable to authorized users in the proposed solution.
4		a. Shown 12 times in calendar year			Please see the response in 1.4.6.2
4		b. Older than 35 years			Please see the response in 1.4.6.2
4		c. Less than 5 existing			Please see the response in 1.4.6.2
4		d. Not homebuilt/kit or experimental.			Please see the response in 1.4.6.2
4		e. Airworthy			Please see the response in 1.4.6.2
4	1.4.6.3	The System shall generate, prepopulate, and send historic/museum aircraft correspondence from saved templates as selected by an authorized user including, but not limited to:		Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution
4		a. Ineligible/Does not qualify notice		Must Have	Please see the response in 1.4.6.3
4		b. Benefits explanation notice		Must Have	Please see the response in 1.4.6.3
4	1.4.6.4	The System shall have the capability to calculate the effects of applying the indicated exemption for an indicated record once initiated by an authorized user	The system should have the capability for the assessor staff to override the final value of exemption	Must Have	When the proposed system design would detect a change in value or exempt amount, the user would be presented with a view of the before and after for the affected assessments and the user may approve the changes or choose to rework the claim. Once approved, the changes will become part of the associated assessemnts.
4	1.4.6.5	The System shall have the capability to apply all approved calculations to the indicated property record for the indicated roll year(s) according to preconfigured business rules	Calculations Logic is based on the date on which the form is received back and the % of exemption is calculated as follows: 1. Feb 15 - 100% 2. Between Feb 16 - Aug 1 --> 80% 3. On or after Aug 2 - Aircraft failed to qualify for the exemption	Must Have	This request is part of the proposed Exemption Claim record and Exemption Calculation Utility design for the proposed solution.
4	1.4.6.6	The System shall have the capability for the authorized user to input the fee charged for new aircraft	First time Application Fee paid by the owner	Must Have	This request is part of the proposed Exemption Claim record and Exemption Calculation Utility design for the proposed solution.
4	1.4.6.7	The System shall have the capability to hold a historic or museum aircraft exemption claim until the associated new aircraft fee has been paid		Must Have	The interface to determine if the fee has been paid would delivered as a constituent working function of the final delivered System. .

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.6.8	The System shall have the capability to identify late historical aircraft claims	A claim is considered late after Feb 15th and after Aug 1st, the claim is denied	Must Have	This request is part of the proposed Exemption Claim record and Exemption Calculation Utility design for the proposed solution.
4	1.4.6.9	The System shall have the capability to apply an exemption percentage(full/partial exemptions) to historical aircraft claims according to preconfigured business rules	Business Rule/Calculations Logic for partial exemptions is based on the date on which the form is received back and the % of exemption is calculated as follows: 1. Feb 15 - 100% 2. Between Feb 16 - Aug 1 --> 80% 3. On or after Aug 2 - Aircraft failed to qualify for the exemption	Must Have	This request is part of the proposed Exemption Claim record and Exemption Calculation Utility design for the proposed solution.
3	**1.4.7**	**Commercial Fishing Exemption**			
4	1.4.7.1	The System shall have the capability to display claim information for an authorized user to determine if an owner qualifies for a commercial fishing exemption including, but not limited to:	The system should have the capability to capture external data sets like DMV data & Coast Guard data to display the information related to the specified Vessel Number	Must Have	This requested comprehensive feature will be delivered as a constituent working function of the final delivered System.
4		a. Takes fish/living resources from the sea for commercial use			Please see the response in 1.4.7.1
4		b. Oceanographic Research vessel			Please see the response in 1.4.7.1
4		c. Transporting 7 or more people for commercial passenger fishing			Please see the response in 1.4.7.1
4		d. Holds a Coast guard inspection Certificate			Please see the response in 1.4.7.1
4		e. Has a Coast guard document number			Please see the response in 1.4.7.1
4		f. Has a Fish and game #			Please see the response in 1.4.7.1
4		g. Has Fish and game registration number			Please see the response in 1.4.7.1
4	1.4.7.2	The System shall generate, prepopulate, and send commercial fishing correspondence from saved templates as selected by an authorized user including, but not limited to:	The system should have the capability to interface with the document repository to access templates	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution dessign.
4		a. Ineligible/Does not qualify notice		Must Have	Please see the response in 1.4.7.2
4		b. Benefits explanation notice		Must Have	Please see the response in 1.4.7.2
4	1.4.7.3	The System shall have the capability for the authorized user to input the full Cash Value of the Vessel		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.7.4	The System shall have the capability to calculate the effects of applying the indicated exemption for an indicated record once initiated by an authorized user	The system should have the capability for the assessor staff to override the final value of exemption	Must Have	The proposed solution design fully comports with this functional request.
4	1.4.7.5	The System shall have the capability to apply all approved calculations to the indicated property record for the indicated roll year(s) according to preconfigured business rules	Calculations Logic is based on the date on which the form is received back and the % of exemption is calculated as follows: 1. Feb 15 - 100% 2. Between Feb 16 - Aug 1 --> 80% 3. On or after Aug 2 - Boat failed to qualify for the exemption	Must Have	The proposed solution design fully comports with this functional request.
4	1.4.7.6	The System shall have the capability for the authorized user to override the final values		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.7.7	The System shall have the capability to identify late Commercial Fishing Boat claims	A claim is considered late after Feb 15th and after Aug 1st, the claim is denied	Must Have	This request is part of the Exemption Claim record and Exemption Calculation Utility design for the proposed solution.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.7.8	The System shall have the capability to apply partial exemptions to commercial fishing claims according to preconfigured business rules including, but not limited to:	Business Rule/Calculations Logic for partial exemptions is based on the date on which the form is received back and the % of exemption is calculated as follows: 1. Feb 15 - 100% 2. Between Feb 16 - Aug 1 --> 80% 3. On or after Aug 2 - Boat failed to qualify for the exemption Note :- No late fees for boats	Must Have	This request is part of the Exemption Claim record and Exemption Calculation Utility design for the proposed solution.
4		a. Date of filing			Please see the response in 1.4.7.8
4		b. Assessment amount			Please see the response in 1.4.7.8
4		c. Proration schedule			Please see the response in 1.4.7.8
3	**1.4.8**	**Institutional Exemption**	**Includes both Secured and Unsecured properties**		
4	1.4.8.1	The System shall have the capability for the authorized user to select/de-select the exemption type for which the institutional exemption form should be sent		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.8.2	The System shall have the capability to generate and send forms for annual filing, electronically or by US Mail		Must Have	This functional request would be performed via the underlying use of a 'mail merge' process in the proposed solution.
4	1.4.8.3	The System shall have the capability for the authorized user to select/de-select the exemption type for which the institutional exemption notice should be sent		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.8.4	The System shall have the capability to generate and send notice for annual filing, electronically or by US Mail	Currently Religious exemptions are not filed annually. So this notice is sent to get a confirmation of the continued exempt use of property	Must Have	This functional request is performed via the underlying use of a 'mail merge' process in the proposed solution design.
4	1.4.8.5	The System shall have the capability to store updateable annual institutional exemption forms/templates including, but not limited to:	Forms from the BOE are received annually. We make versions with county specific changes(ex. Add office seal & address). For mailing, we add barcode & claimant information. We also use forms developed outside of the BOE. After completed forms are submitted by claimants, we need to be able to store, access, modify(read, write) them.	Must Have	This request is available in the proposed solution design. However, it is envision this request will require some first-hand analysis of the currently envisioned graphical user interface as it relates to some of the data that will be reflected in this view. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System
4		a. Word and PDF templates of exemption forms provided by the BOE	We currently store Word templates used in mail merge with spreadsheet and manually edit the templates to incorporate changes from new revisions published by the BOE.		Please see the response in 1.4.8.5
4		b. Annual claim forms related to specific exemptions	There are BOE forms for all institutional exemptions including welfare exemptions.		Please see the response in 1.4.8.5
4	1.4.8.8	The System shall have the capability to associate multiple organizations with an individual parcel/account	One parcel can have multiple tenants that use the same property for different exempt purposes	Must Have	This is accomplished with the proposed solution design via the 'Ownership History' Module where owners, agents, organizations, and various other type of entities may be associated with a parcel.
4	1.4.8.9	The System shall have the capability to associate multiple exemptions with an individual parcel/account	One parcel can have multiple units that are used for different exempt purposes	Must Have	The proposed solution design fully comports with this functional request.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.8.10	The System shall have the capability to track the exemption status.	This could include status such as received, pending, reviewed, completed.	Must Have	Every entity associated with a property may have an exemption claim record with a trackable status in the proposed solution design.
4	1.4.8.11	The System shall have the capability to calculate prorated exemptions based on information including, but not limited to:	See below.	Must Have	This function is part of the Exemption Claim record and Exemption Calculation Utility of the proposed solution design.
4		a. Days of use	Based on R&TC, the CIO date and date put to exempt are used to determine if a property is exempt and when(potentially, exempt use starts after date of CIO, but no exemption until possibly lien date for next fiscal year).		Please see the response in 1.4.8.11
4		b. Square footage	total sf of land, total sf of improvements, sf per purpose		Please see the response in 1.4.8.11
4	1.4.8.12	The System shall have the capability to allow the system calculated exemption values to be overridden manually by authorized user		Must Have	The proposed solution design fully comports with this functional request.
4	1.4.8.13	The System shall have the capability to store and apply multiple institutional exemptions including, but not limited to:		Must Have	This function is part of the proposed Exemption Claim record and Exemption Calculation Utility design as it relates to the proposed solution.
4		a. Cemetery			Please see the response in 1.4.8.13
4		b. Church			Please see the response in 1.4.8.13
4		c. Free Museums/Library			Please see the response in 1.4.8.13
4		d. Lessees	E.g.: Lessee on Public School Campus		Please see the response in 1.4.8.13
4		e. Lessors			Please see the response in 1.4.8.13
4		f. Public Schools			Please see the response in 1.4.8.13
4		g. Religious			Please see the response in 1.4.8.13
4		h. Veterans Organization			Please see the response in 1.4.8.13
4		i. Welfare			Please see the response in 1.4.8.13
4		j. Public Colleges			Please see the response in 1.4.8.13
4		k. Private Colleges			Please see the response in 1.4.8.13
4		l. Consulate			Please see the response in 1.4.8.13
4	1.4.8.14	The System shall have the capability to generate and send notifications electronically/US Mail, to known claimants, if they have not submitted claim by a preconfigured date.	If status stored is, say, claim form sent, and timer goes, off, form processor can take action(process received form, initiate reminder to claimant to submit, …)	Must Have	This functional request is performed via the underlying use of a 'mail merge' process with the criteria to select the claimants that have not yet submitted a new claim in the proposed solution design.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.4.8.15	The System shall have the capability to identify and notify authorized users of any known claimants who have not filed to renew their exemption for the working roll year including, but not limited to:		Must Have	The Exemptions Subsystem within the proposed solution recognizes the types of exemptions that require the claimant to file an annual request to renew their exemption. With the combination of the solution's End-of-Year Closing & New-Year Preparation utilities, accounts with said exemption types that are missing a renewal form will automatically have a Workflow line item created and assigned to an authorized user. The Workflow entry serves as the catalyst to send the taxpayer a reminder to file for the renewal if they still want to have the exemption. It will also serve as the system's reminder to remove the Exemption from the account if the renewal request is not received.
4		a. Exemption holders who should renew their exemptions and have not done so			This functional request is performed via the underlying use of a 'mail merge' process with the criteria to select the claimants that have not yet submitted a new claim in the proposed solution.
4	1.4.8.16	The System shall provide the capability for authorized users to remove exemptions for individual exemption holders		Must Have	This functional request is performed via the underlying use of a 'mail merge' process with the criteria to select the claimants that have not yet submitted a new claim in the proposed solution.
4	1.4.8.17	If an Institutional exemption is removed from a Property, then the system shall generate a notification and send it to the authorized users	Authorized User here is the Assessor Staff handling the Inst. Exemption	Must Have	Please see the response in 1.4.8.15
4	1.4.8.18	When a claim for a new institutional exemption is received, the System shall have the capability for the authorized user to input the information into the system. The System shall prepopulate known information based on pre-defined key field(s)	E.g. :For Welfare exemptions, the key fields are APN/Account# & OCC.	Must Have	Please see the response in 1.4.8.13
4	1.4.8.19	The System shall have the capability to validate entered claimant-provided corporate ID numbers against ID numbers saved in the System as provided from the BOE	For the welfare exemption, the BOE issues to organizations, an OCC(Organizational Clearance Certificate) which contains an OCC No. and Corporate ID or LLC ID No. Currently, they publish PDF format files listing these on their website and typically update it quarterly. For low-income housing, there may be a limited partner that is issued and SCC(Supplemental Clearance Certificate) which contains an SCC No. Move to the first part after entering value	Must Have	Please see the response in 1.4.8.13
4	1.4.8.20	The System shall provide the capability for an authorized user to select and send additional required supporting document templates from a preconfigured list of document templates		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.4.8.21	The System shall have the capability to display application information for an authorized user to determine if an organization qualifies for the selected institutional exemption type including, but not limited to:		Must Have	The proposed solution fully comports with this functional request.
4		a. Exemption application type			The proposed solution fully comports with this functional request.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		b. Other organizations using the property			The proposed solution fully comports with this functional request.
4	1.4.8.22	The System shall have the capability for an authorized user to input the decision whether an organization qualifies for the selected institutional exemption		Must Have	The proposed solution fully comports with this functional request.
4	1.4.8.23	The System shall have the capability to calculate and display for preview, the results of the indicated exemption including, but not limited to:	This should include changes to the open roll, supplemental roll, escapes and roll corrections	Must Have	This functional request will require some minor modification to the proposed solution design.
4		a. Partial qualifications			This functional request will require some minor modification to the proposed solution design.
4		b. Full qualifications			This functional request will require some minor modification to the proposed solution design.
4	1.4.8.24	The System shall have the capability to apply all approved calculations to the indicated property record for the appropriate roll year(s)		Must Have	The proposed solution fully comports with this functional request.
4	1.4.8.25	The System shall have the capability to associate the supplemental/roll correction resulting from the exemption to the exempt organization that is granted the exemption		Must Have	The proposed solution fully comports with this functional request.
4	1.4.8.26	The System shall have the capability to calculate and apply a late penalty to late applications based on preconfigured business rules related to information including, but not limited to:	Based on the current BOE Rules, an organization may receive a maximum penalty of $250 per year independent of whether they have 1 or more claims that are late.	Must Have	This function is part of the Exemption Claim record and Exemption Calculation Utility design as it relates to the proposed solution.
4		a. Has the organization already paid a late fee for that year and the amount;			Please see the response in 1.4.8.26
4		b. Date of Claim Submission;			Please see the response in 1.4.8.26
4		c. Published payment deadlines			Please see the response in 1.4.8.26
4		d. Tax Rate Area	For calculating the Tax Rate % based on TRA		The proposed solution fully comports with this functional request.
2	**1.5**	**Calamities**			
3	**1.5.1**	**General: Calamities**			
4	1.5.2.1	The System shall have the capability to create new activity based on the details in the calamity application submitted		Must Have	This functional request is part of the Decline and Calamity modules as it relates to the overall proposed solution.
4	1.5.2.2	The System shall provide the capability for authorized users to document review findings in the System including, but not limited to:		Must Have	This functional request is part of the Decline and Calamity modules as it relates to the overall proposed solution.
4		a. Date of damage	Currently the last day of the prior month	Must Have	Please see the response in 1.5.2.2
4		b. Affected portion of property (land, improvement, fixture, personal property or multiple)	The user should be able to enter the portion of the property identified as damage, i.e. land, imps, business property.	Must Have	Please see the response in 1.5.2.2
4		c. Market value of land or improvements affected by the calamity	The assigned appraiser should be notified to complete a full market value appraisal of the subjects damaged property as of one day prior to the day of damage	Must Have	Please see the response in 1.5.2.2
4		d. Cause of the calamity from a pre-configured list	a list to include fire, flood, acts of nature, governor declared state of emergency etc.		Please see the response in 1.5.2.2
4		e. Description of calamity and other relevant notes	The user should be able to enter notes regarding the calamity	Must Have	Please see the response in 1.5.2.2
4		f. Cost to cure	Costs to cure, from submitted documentation	Must Have	Please see the response in 1.5.2.2

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		g. Photos	Any photos should be made available and entered to the property for review	Should Have	Please see the response in 1.5.2.2
4		h. Field check findings	All findings should be entered to the property	Must Have	Please see the response in 1.5.2.2
4		i. Effective date (last day of the previous month)	The system should calculate the effective date as the last day of the previous month of the date of damage		Please see the response in 1.5.2.2
4		j. Status of repair as of the Lien Date/completion date	The user should be notified of any permits related to damage repairs		Please see the response in 1.5.2.2
4	1.5.1.3	The System shall have the capability for the authorized user to indicate and track if a property is eligible for tax deferral due to a declared calamity		Must Have	The proposed solution provides the business rules mechanism for the Assessor Office to adjust assessed values in order to recognize destruction caused by a calamity or misfortune which damages real or personal property. Tax deferral information can be assimilated into the system from the tax office. This can occur in a number of different ways. The first being a simple physical file passed between the two entities via a shared folder or FTP. The later could be as seemless as a custome built API between the two systems.
4	1.5.1.4	The System shall have the capability to notify the Controller/Tax collector about a property eligible for tax deferral due to a declared calamity		Must Have	Please see the response in 1.5.1.3
4	1.5.1.5	The System shall have the capability to display calamity information for authorized user review including, but not limited to: a. The calamity form b. Any other documentation	All information related to the calamity should be available to the user	Must Have	The systems internal file storage area will house scanned hard copies or electronic data that can reproduce these forms on demand for users to access as needed. The assigned assessor with security and the proper role can vew the calamity information with the system as needed / on demand and make modifications as required.
4	1.5.1.6	The System shall provide the capability for authorized users to proceed through calamity processing regardless of tax payer response	The user should determine whether or not the assessor can proceed regardless of all information has been received from the applicant.	Must Have	The system shall allow for manual adjustments when required by state law.
3	**1.5.2**	**Real Property Calamities**			
4	1.5.2.1	The System shall provide the capability for authorized users to view and edit real property calamity information including, but not limited to: a. Calamity property address b. Calamity property neighborhood c. Calamity property district d. Calamity property description e. Affected portion of parcel (land, improvement, or both) f. APN - Assessor Parcel Number g. Date of calamity	All information related to the damaged property(e.g.: listed as (a) thru (g)) should be displayed for the user once the parcel is identified. The key for the system to identify the parcel is the APN	Must Have	This functional request is part of the Decline and Calamity modules as it relates to the overall proposed solution.
4	1.5.2.2	The System shall generate, prepopulate, and send real property calamity correspondence from saved templates as selected by an authorized user including, but not limited to:		Must Have	The proposed solution currently has Calamity correspondence templates, but may need to modify them for the county's requirements.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. Calamity form	When assessor staff receives a call about a calamity the form should be sent to be completed by the owner	Must Have	Please see the response in 1.5.2.2
4		b. Reminder notice	If the form is not received within a certain number of days a reminder is sent	Could Have	Please see the response in 1.5.2.2
4		c. Does not qualify notice	If the damage does not qualify/or it is filed outside of a year, the owner should be notified	Must Have	Please see the response in 1.5.2.2
4		d. Additional information required notice	If they claim is received incomplete a form should be sent requesting additional information	Must Have	Please see the response in 1.5.2.2
4		e. Calamity Supplemental notice	Once the calamity is confirmed a supplemental notice with the values shall be sent to the claimant	Must Have	Please see the response in 1.5.2.2
4	1.5.2.3	The System shall have the capability to calculate and propose a temporary reduction in value based on pre-defined formula	Once the market value is established, land and improvement is allocated and the costs to cure, the system should be able to generate a reduced value.	Must Have	This functional request is part of the Decline and Calamity modules as it relates to the overall proposed solution.
3	**1.5.3**	**Restore Real Property Calamities**			
4	1.5.3.1	The System shall have the capability to monitor calamity lien dates and notify the designated user to review the calamity according to preconfigured business rules	An active calamity shall be reviewed each lien date for progress. The user should be notified to review.	Must Have	This functional request is part of the Workflow Subsystem of the proposed solution design.
4	1.5.3.2	The System shall provide authorized users with the ability to document calamity findings in the System including, but not limited to:	Current information on any calamity should be a part of the assessment record. All items below, a - e included.	Must Have	Please see the response in 1.5.3.1
4		a. Field check findings		Must Have	Please see the response in 1.5.3.1
4		b. New construction (enhancement)		Must Have	Please see the response in 1.5.3.1
4		c. Percent restored		Must Have	Please see the response in 1.5.3.1
4		d. Completion date		Must Have	Please see the response in 1.5.3.1
4		e. Repair information (like-for-like or not)		Must Have	Please see the response in 1.5.3.1
4	1.5.3.3	The System shall have the capability to restore the factored base year value as of the indicated completion date and issue Supplementals	Once the damage has been repaired the FBYV shall be restored.	Must Have	In the proposed solution design all Real Property Assessment store the Factored Base Year Value and the Calamity/Decline value when applicable. Once the calamity has been restored, the Factored Base Year value would be automatically be applied.
4	1.5.3.4	The System shall have the capability to partially restore the properties' assessed value based on the indicated percent complete	On each lien date the percentage repaired is determined and the same percentage of the FBYV is restored by the system	Must Have	In the proposed solution design this functional request is accomplished via the proposed Event Processing module design and the Partial-Complete designed activity.
4	1.5.3.5	The System shall have the capability to identify if a calamity event is active during a change in ownership	When working on a parcel the system should notify the user of all open activities including calamity events.	Must Have	The proposed solution design would check for this when processing CIO.
4	1.5.3.6	If the System identifies that a calamity event is active during a change in ownership, the System shall prompt the designated authorized user asking him/her to review and "clear" the calamity event or not	The user should determine whether or not the change in ownership is a reason to clear the calamity from the system.	Must Have	In the proposed solution design this functional request could be even be configured to automatically happen given certain criteria are met. Otherwise, the user would be prompted.
3	**1.5.4**	**Business Personal Property Calamities**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.5.4.1	The System shall provide the capability for authorized users to review real property calamity information for potential personal property calamities		Must Have	All Personal Property Accounts would be associated with a Real Property account and such cross-referencing translates into a reporting and/or Workflow function for this aspect of the proposed system soluton.
4	1.5.4.2	The System shall generate, prepopulate, and send personal property calamity correspondence from saved templates as selected by an authorized user including, but not limited to:	The system should interface with the document repository to obtain the templates	Must Have	This functional request would be performed via the underlying use of a 'mail merge' process in the proposed solution
4		a. Calamity form to identified account owners		Must Have	Please see the response in 1.5.4.2
4		b. Calamity form reminder notices		Must Have	Please see the response in 1.5.4.2
4		c. Calamity date		Must Have	Please see the response in 1.5.4.2
4	1.5.4.3	The System shall have the capability to monitor for account owner response comes through the Web portal against preconfigured schedules	Schedule : Must be filed within 60 days after the date of loss or within 30 days of Notice by the Assessor	Must Have	This is functionalty would be provided in in the proposed Workflow Subsystem of the overall proposed solution.
4	1.5.4.4	The System shall provide the capability for authorized users to confirm dates and values	E.g. : Assessor staff should have the capability to confirm the calamity date & values, based on their research	Must Have	This functional request would be part of the Workflow and Event Process modules of the proposed solution
4	1.5.4.5	The System shall have the capability to generate a proration and reduction in value for the current year and next year's filing based on preconfigured business rules if applicable	Example of the business rule for Proration(based on Calamity Claim Ltr - SMCA 237A.doc) : Tax savings computed with the minimum allowable ($10,000) damage, which occurred in January, for ½ year tax relief. EXAMPLE (for a 6 month period) : **Assessed value as shown on last tax bill :** Land - $15,000 Improvement - $25,000 Assessable Personal Property - $20,000 Total - $60,000 **Market Value before loss :** Land - $50,000 Improvement - $75,000 Assessable Personal Property - $20,000 Total - $145,000 **Tax relief calculations assuming $10,000 damage to improvements:** = Assessable % loss X Assessable Improvement Value X Tax Rate X 1/2 Year Relief = 13.33 % X $25,000 X 1.25% X 50% = $20.83 where Assessable % Loss = (Damage Loss/ Improvement Value Before Loss) = ($10,000/ $75,000) = 13.33%	Must Have	This function would be accomplished via the Event Processing of Calamity activities in the proposed solution.During the time that the property is classified as being in a state of disrepair, the value is reduced or removed from the roll until the property is reclassified as repaired. If a property structure is restored to its original condition, the original Proposition 13 base year value rules are applied plus a calculated adjustment for the time factor as it relates to the original state of the property. If additional rules are necessary the proposed system will address those requests during discovery.
4	1.5.4.6	The System shall have the capability to prepare and display the Board Change documentation for review and supervisor approval based on preconfigured business criteria	Assessable Personal Property	Must Have	The Board Change documentation would be available for review via a drill-down from the Event and Workflow modules of the proposed solution.
4	1.5.4.7	The System shall have the capability to mark an identified calamity as an unsecured calamity and route it for board change processing(Roll Correction)		Must Have	This function would be fully available via the proposed solution

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.5.4.8	The System shall provide the capability for authorized users to document potential business personal property calamities in the System including, but not limited to:		Must Have	This function would be part of the Decline and Calamity modules of the proposed solution.
4		a. Calamity address			Please see the response in 1.5.4.8
4		b. Calamity description			Please see the response in 1.5.4.8
4		c. Calamity discovery method including, but not limited to:			Please see the response in 1.5.4.8
4		1. Newspaper			Please see the response in 1.5.4.8
4		2. Situs visit			Please see the response in 1.5.4.8
4		3. Television and other media			Please see the response in 1.5.4.8
4		4. Marina			Please see the response in 1.5.4.8
4		5. Airport			Please see the response in 1.5.4.8
4		6. Self-report			Please see the response in 1.5.4.8
2	**1.6**	**Business Personal Property**			
3	**1.6.1**	**General: Business Property Statements**			
4	1.6.1.1	The System shall have the capability to associate a business with the appropriate property statement type including, but not limited to:	Include all property types as commercial aircraft, bio tech companies, high tech companies, leasing/vending companies The key information that the system should use to make this association is the Rec Type	Must Have	This function would be accomplished by the User-Defined Coding Schema of the proposed solution.
4		a. Real property			Please see the response in 1.6.1.1
4		b. Business property	Business Personal property, Aircrafts, Boats		Please see the response in 1.6.1.1
4		c. Apartment			Please see the response in 1.6.1.1
4		d. Agriculture			Please see the response in 1.6.1.1
4		e. Oil and gas			Please see the response in 1.6.1.1
4		f. Geothermal power			Please see the response in 1.6.1.1
4		g. Possessory Interest			Please see the response in 1.6.1.1
4	1.6.1.2	The System shall have the capability to assign unprocessed filings and non-filers to auditor/appraiser work queues based on information including, but not limited to:	It is authorized user work queues	Must Have	In the proposed solution business accounts would be assigned a 6-9 character prefix that defines the business and a 3 or 4 character suffix that defines the headquarters and branches. Moreover, for this engagement the proposer believes it can use its existing well developed coding scheme.
4		a. Record type		Must Have	Please see the response in 1.6.1.2
4		b. Territory			Please see the response in 1.6.1.2
4		c. Business property type			Please see the response in 1.6.1.2
4		d. Roll type			Please see the response in 1.6.1.2
4		e. Value and/or value range			Please see the response in 1.6.1.2
4		f. Audit assignments			Please see the response in 1.6.1.2
4	1.6.1.3	The System shall provide authorized users with the ability to select to send all types of business property statements	e.g. Business, Apts, Aircrafts, Boats, Leasing, Commercial Aircraft, Banks, etc. The system should interface with the document repository to access different templates.	Must Have	This function would be fully available in the proposed solution

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.1.4	The System shall have the capability for the authorized user to flag the below : 1. Business Property Statement needs to be sent to an account or not, including the accounts of all identified Possessory Interest(PI) lessees 2. Business Property Statement has been sent to an account or not, including the accounts of all identified PI lessees	For e.g.: many of the Possessory Interest(PI) accounts do not receive a Business Property Statement (571-L) under the PI Only account number. At the time of account creation or at a given point of time, the System shall provide the authorized user with the ability to update the flag indicating that a Business Property Statement needs to be sent to that Account. Also there should be a way for the authorized user(BPP Staff in this context) to flag that the Business Property Statement is sent so that PI Appraisers do not send it again or Vice Versa	Should have	These capabilities can be available within the proposed solution.
4	1.6.1.5	The System shall have the capability to monitor and update the account records automatically or provide the capability for the authorized to update the account, when Business Property Statements are received	This feature needs to be available for Possessory Interest Lessee Accounts also	Must Have	These capabilities will be available within the proposed solution.
4	1.6.1.6	The System shall have the capability to store all the data received through the Business Property Statements including the Leasehold Improvements data		Must Have	Our proposed solution will store and submit certs for 571-L and 571-R submissions.
4	1.6.1.7	The System shall have the capability to link and de-link all related business accounts (e.g. Headquarter and branches)	The key information that the system should use to make this association is the 'Owner Name'	Must Have	This functionality would be provided via the proposed solution's Field Canvasing Utility in the proposed solution
3	**1.6.2**	**General - Business Personal Property**			
4	1.6.2.1	The System shall have the capability for authorized user to perform various account related activities including, but not limited to:		Must Have	The proposed system incorporates all conventional, as well as advanced methods of Personal Property appraisal. Through SIC based IBI modeling, cost table valuation and automated asset trending and depreciation techniques -- the tax professional adds efficiency, accuracy and most important, dependability, to their Personal Property appraised values. Utilizing simple field calls, this personal property appraisal module has the ability to accurately and efficiently value all categories of Personal Property -- Inventory, Furniture and Fixtures, Machinery and Equipment, Lease Hold Improvements, Mobile Homes, Computers, Vehicles and more -- as well as being linked to APNs found in our real estate system.
4		a. Create New accounts	The System shall have the flexibility to create account numbers in various formats based on the pre-defined business Rules(e.g.: type of Business Personal Property - Aircrafts, Boats, Leased Equipment etc.) which may be different from the current legacy system format		This is a basic feature of the business personal property assessment process. If new account # schema's are required for more expansive account numbers the pre-existing account numbers can be indexed and linked to the new systems generated account numbers based off the new schema. The legacy numbers will be retained in the data set but could not be displayed to the user if desired
4		b. Inactivate accounts			This is a basic feature of the business personal property assessment process

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		c. Reactivate accounts			This is a basic feature of the business personal property assessment process
4		d. Creating new Property Types and related attributes	Example of attribute is Life of the property		The proposed system will not only support creating new prop types and related attributes it will allow you to change them mid season as necessary with out reprocussion
4		e. Change the Account status	E.g.: Put a PI Account to 'Pending' status until confirmed by an authorized user		This is a basic feature of the business personal property assessment process
		f. Update the Use Code	E.g.: Update the Use Code to : -NB - no bill, -SEC - assessed on Secured Roll, -CITY / CO - city or county or any other government entity that is the lessee and therefore not assessable but was reported and data is for informational purposes only, -SFIA, -Cable Etc.		This is a basic feature of the business personal property assessment process
4	1.6.2.2	The System shall have the capability for the authorized user to review and approve accounts in various statuses like New, Active, Inactive etc.		Must Have	This is a basic feature of the business personal property assessment process
4	1.6.2.3	The System shall have the capability to compare uploaded/updated discovery information to prior year listings to identify selected accounts including, but not limited to:		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Active accounts			Please See the Response to 1.6.2.3
4		b. Inactive accounts			Please See the Response to 1.6.2.3
4		c. New accounts			Please See the Response to 1.6.2.3
4		d. Associated accounts			Please See the Response to 1.6.2.3

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.2.4	The System shall have the capability to maintain a master list of unsecured properties including, but not limited to:	Also secured businesses	Must Have	1.Not only will this proposed system provide a master list of these property types, but it will keep up with the aging of the properties for asset trending for next year's appraisal period. 2.The below is an abbreviated representation of just some of the more significant functionalities that has been identified by actual experience for successful unsecured (or if required, in a secure module) marine & aviation appraisals in the State of California. 3.The automatic aging of vessel/aircraft for the next tax year period, Ownership verification processing, Dock/airport walks, Marina/Airport profiles can be created for enhanced valuation support, DMV processing and Coast Guard processing, The total System is completely table driven, establishing high confidence data integrity, Unlimited multi-year history, audit history and file maintenance, Complete integrated tracking from Assessor to Auditor to Tax Collector, Direct billing, Penalty billing which is controlled by Assessor, and therefore not controlled or mandated by batch jobs, On demand printing of property statements, Integrated-relational Address Book functionality, User defined step-level processing; i.e., Business statement processing - sent, received, processed, reviewed, approved and billed, Working roll, current year roll and prior year(s) roll can all be worked simultaneously, Swapping/Copying capabilities are highly enhanced for all data, this reduces data entry for new businesses, and improves overall workflow, Items can be billed daily,
4		a. Aircraft			Please see the response to 1.6.2.4
4		b. Boat			Please see the response to 1.6.2.4
4		c. Leased equipment			Please see the response to 1.6.2.4
4		d. Business Properties			Please see the response to 1.6.2.4
4		e. Special property types like oil, gas, possessory interest, properties on leased government lands			Please see the response to 1.6.2.4
4	1.6.2.5	The System shall have the capability to maintain and uniquely identify Equipment Lessor and Lessee accounts	Database of all leasing accounts	Must Have	These capabilities can be available within the proposed solution.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.2.6	The system shall have the capability for the authorized user to approve an Agent	The system should have the capability to do special authorization for Agents before giving Electronic access. County Rules that the authorized user /system should check:- 1. The Agent Authorization form (for San Mateo County/ general form signed by the account owner) must be signed and filed in the current year.	Must Have	The existing Hamer Enterprises system can provide this ability. It will be incorporated into the proposed system. If the agent has the credentials delivered to the property owner then the agent can perform all tasks on the owner's behalf including submission of a certified statement. This submission will record all the identification and contact details of the agent. The sapient and hamer team will add valid compare logic to make sure a "true" output is returned for agent authorization on file at SMCARE. In fact the owner could submit this form electronically thourgh the web portal as well.
4	1.6.2.7	The System shall have the capability to store all the attributes related to Business Personal Property Accounts(including Possessory Interest Accounts) and all the factors required for valuation. The system shall also provide the capability for the authorized user to input/upload and save any required data	For e.g.: The System shall have fields : 1. to capture comments and notes for each account/lessee/tenant. 2. for storing indicators showing available exemption information like welfare, religious & institutional exemptions, as well as, homeowner exemption along with the relevant social security number. 3. to store value for Personal Property & Fixtures, cap rate, base year, number of rent payments per year (monthly, quarterly, bi-annual or annual) 4. to store Leasehold Improvement and Leasehold Land values based on calculations from Structures and Fixtures 5. for Account Type Code - i.e. (PI - possessory interest, PIO - possessory interest only, PIE - possessory interest welfare exemption, BUS - business, etc.) 6. for indicating the corresponding Agency/Lessor(for easy identification of relationship between Lessor and Lessees) 7. Etc.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.2.8	The System shall have the capability to allow an Agent to act on behalf of a Lessor according to predefined County rules	The system should have the capability to do special authorization for Agents before giving Electronic access. County Rules that the business user /system should check:- 1. The Agent Authorization form (for San Mateo County/ general form signed by the account owner) must be signed and filed in the current year.	Must Have	Please see response to 1.6.2.6
4	1.6.2.9	The system shall flag accounts that need real property staff consultation based on the pre-defined business rules including but not limited to:	Leasehold Communique must be sent to real property in these cases	Must Have	This will be implemented as part of the proposed system
4		a. Structures equal or greater than $50,000			Please see response to 1.6.29
4		b. Fixtures equal to or greater than $500,000			Please see response to 1.6.29

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.2.10	The System shall prompt authorized users to notify Real Property staff of relevant construction or other events for value allocations, based on pre-defined business rules	The system shall prompt the user to notify Real Property staff to investigate and take action to pick up value (Currently done thru Leasehold Communiques)	Must Have	The workflow manager logic will not only make these life cycle stages reviewable and notifiable, it will assign these stages to specific users with specific roles based on the applicable business rules.
4	1.6.2.11	The System shall have the capability for the authorized user to determine current Valuation based on listed property and corresponding documents and input them into the System	This is applicable especially in the case of Hand Bill Requests	Must Have	These capabilities will be available within the proposed solution.
4	1.6.2.12	The System shall have the capability to perform all the calculations required to do valuation/assessment and provide a resultant value based on the pre-defined business rules		Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.The valuation can be calculated based on a schedule. A multitude of schedules can be defined and stored in the system as necessary by the client
4	1.6.2.13	The System shall have the capability to display the results of the valuation/assessment for preview	This should include changes to the open roll, supplemental roll, escapes and roll corrections	Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.
4	1.6.2.14	The System shall have the capability for the authorized user to edit the values(including System calculated values) after preview and before submitting for approval		Must Have	This will be fulfilled within the business personal property assessment and electronic signature capabilities of the proposed solution.
4	1.6.2.15	The System shall have the capability for the authorized user to submit the values for Supervisor approval. The System shall also have the capability to send the values for a second level approval based on the pre-defined business rules	For e.g.: the System should workflow should direct the transaction for a second level approval by Deputy Assessor if the value is higher than a pre-configured threshold	Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.
4	1.6.2.16	The System shall provide authorized users with the ability to review/comment/cancel auditor/appraiser valuation/assessment or to mass approve valuation/assessment	The authorized user here is Supervisor	Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.
4	1.6.2.17	The System shall have the capability for the Supervisor to send back(including notification) the activity to the originator, if the valuation/assessment need to be corrected based on the review		Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.
4	1.6.2.18	The System shall provide authorized users with the ability to edit pre-enrolled values with required documentation including, but not limited to:	The authorized user here is Supervisor	Must Have	This will be fulfilled within the business personal property assessment and electronic signature capabilities of the proposed solution.
4		a. Reason for the change			Please see response to 1.6.2.18
4		b. Additional comments			Please see response to 1.6.2.18
4	1.6.2.19	The System shall have the capability to notify originating assessor staff & supervisor, of value modifications and documentation of the reasoning		Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.
4	1.6.2.20	The System shall have the capability to release approved valuations/assessment to the appropriate roll	Roll includes Supplemental , Annual & Corrections	Must Have	This will be fulfilled within the business personal property assessment capability of the proposed solution.
4	1.6.2.21	The System shall have the capability to load all the Valuation/Trend factors into the system as per the pre-defined schedule and as provided by the different Authorities	Authorities include, but not limited to : CAA, BOE	Must Have	Please see response to 1.6.2.12

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.2.22	The System shall have the ability to track real property characteristics of business property when there is a change in ownership of the business property and prompt authorized users to notify the real property staff of the changes	The system shall prompt the users to notify Real Property staff to investigate and take any necessary action(Send Leasehold Communique).	Must Have	This will be fulfilled within the proposed solution. As part of the initial step the taxpayer/citizen is prompted to answer questions regarding their business and if in the past year it has moved within the county, moved outside of the county, closed permanently, or was sold to a new owner. For more information on this please see section 1.1.6 of Template G Business Personal Property
3	**1.6.3**	**Business Discovery**			
4	1.6.3.1	The System shall provide authorized users with the ability to generate a list of existing active business accounts in the identified geographic areas	And office buildings, multi tenant buildings	Must Have	This function would be accomplished via the proposed solution's currently well developed User-Defined Coding schema.
4	1.6.3.2	The System shall provide the ability for authorized users to determine and assign the geographic territories and special assignments to auditor/appraiser work queues	Authorized User here is the Principal Appraiser The System shall notify the assignee about the new assignment	Must Have	This function would be part of the proposed Workflow Subsystem solution
4	1.6.3.3	The System shall provide authorized users with access to all necessary tools, worksheets, and valuation utilities as necessary to perform field canvassing activities while in the field	Include data transfer from electronic tablets, cameras, etc., ability to update data from the field	Must Have	This function would be accomplished via the User-Defined Coding schema. Moreover, this request will be fulfilled via the web portal solution.
4	1.6.3.4	The System shall provide authorized users with the ability to research accounts by applicable identifiers including, but not limited to:	Ability to search for words that are partially spelled/spelled using wild characters(feature like 'Google search'). Also alert user of potential duplicate account(e.g.: two similar names with the same address).	Must Have	This function would be accomplished via the proposed solution's User-Defined Coding schema.
4		a. Owner name			Please see the response in 1.6.3.4
4		b. Business name			Please see the response in 1.6.3.4
4		c. Business location			Please see the response in 1.6.3.4
4		d. Headquarter account			Please see the response in 1.6.3.4
4		e. Address(es)			Please see the response in 1.6.3.4
4		f. Active/inactive status			Please see the response in 1.6.3.4
4		g. Parcel number			Please see the response in 1.6.3.4
4	1.6.3.5	The System shall provide the ability for authorized users to document the findings from their research about businesses discovered through multiple means including, but not limited to:		Must Have	This function would be fully available in the proposed solution
4		a. Receiving/uploading a list from a vendor			Please see the response in 1.6.3.5
4		b. Building departments			Please see the response in 1.6.3.5
4		c. BOE			Please see the response in 1.6.3.5
4		d. Newspaper and other media			Please see the response in 1.6.3.5
4		e. Calamity claims			Please see the response in 1.6.3.5

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.3.6	The System shall have the capability to support various actions that the authorized user needs to take based on their research including but not limited to : 1. Creating new accounts for new businesses discovered 2. Updating the details about the Accounts including Status of the account		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System. Furthermore, as part of the web browser application the assessor's out in the field will be able to enter this information remotely.
4	1.6.3.7	The System shall have the capability to perform further actions based on the authorized user inputs including but not limited to : 1. Route the account to other authorized users for additional research 2. Notify Authorized users(Principal Auditor-Appraisers) about the creation/update on accounts for review		Must Have	Similar to other functional areas the discovery users will have access and utilize the workflow management process built into the proposed system and configured with client specific business rules for this scenario to direct the record through the discovery life cycle, or in other words from craddle to grave... or supplemental roll in this case.
3	**1.6.4**	**Prepare for Business Property Statements**			
4	1.6.4.1	The System shall provide the capability for authorized users to upload, edit, and save the current year business property statement template/form	Download from BOE site	Must Have	This request will be fulfilled via the proposed web portal.
4	1.6.4.2	The System shall provide the capability for authorized users to generate the print/mailing information to be sent out to the print/mailing vendor including, but not limited to:		Must Have	The proposed solution will be able to generate the forms and extract them into files/tables to be sent to the Print Vendor
4		a. Paper stock			Please see the response in 1.6.4.1
4		b. Envelopes			Please see the response in 1.6.4.1
4		c. Inserts			Please see the response in 1.6.4.1
4		d. Mailing instructions			Please see the response in 1.6.4.1
4		e. PDF of the edited forms			Please see the response in 1.6.4.1
4		f. Data file of assessees			Please see the response in 1.6.4.1
4		g. Postage			Please see the response in 1.6.4.1
4	1.6.4.3	The System shall have the capability to transmit information to and from the Print/Mailing Vendor via an interface, data file transfer or via email	Information includes, but not limited to: a. Paper stock b. Envelopes c. Inserts d. Mailing instructions e. PDF of the edited forms f. Data file of assessees g. Postage	Must Have	Please see the response in 1.6.4.1
4	1.6.4.4	The System shall have the capability for the authorized user to set and track the status of the Business Property Statement associated with each account	The Status includes, but not limited to REQ,SNT, RCV etc.	Must Have	The proposed solution will have a work in progress or electronic certificatoin process that will track the status of each certification. Reports based on status are also available. Furthermore, if the status of the electronic file for each individual tax payer is required those can also be made availalbe. For instance, which business owerners have completed steps 1 and 2 in the certification submission process.
3	**1.6.5**	**Electronic Business Property Statements**			
4	1.6.5.1	The System shall have the capability to prepare the business property statement using data as ~~preconfigured~~ available in the System including, but not limited to:	Prepopulate account information including ownership, mailing address, location address, cost data	Must Have	Our solution will process and prepare business statements.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. Business Identification Numbers (BINs)			Please see the response in 1.6.5.1
4		b. Informational letter			Please see the response in 1.6.5.1
4	1.6.5.2	The System shall have the capability to send San Mateo County account and roll information to the administrator of any subscribed SDR and ESDR services		Must Have	The proposing vendor can perform this functional request via its SDR Processing Utility design.
4	1.6.5.3	The System shall have the capability to receive and save BIN numbers from the County Administrator of any subscribed SDR and ESDR services	ESDR - Electronic Standard Data Record	Must Have	Please see the response in 1.6.5.2
4	1.6.5.4	The System shall have the capability to create and distribute BIN notification letters Electronically or via other means including sending them to Print/Mailing Vendors		Must Have	Please see the response in 1.6.5.2
4	1.6.5.5	The System shall have the capability to notify authorized users about the creation of BIN notification letters and provide the capability to review and approve those letters by multiple levels of authorized users	Example of multi-level approval is : 1st Level Approval by Assessor standards and 2nd Level approval by Principal Auditor-Appraiser	Must Have	The WIP or work in progress process built into the proposed system and configured with client specific business rules for this scenario to direct the record through the BIN creation life cycle, and will notify as many users as specified to approve the creation of a new Business Identification Number.
3	**1.6.6**	**Special Business Property and Repeat Request Statements**			
4	1.6.6.1	The System shall have the capability to identify necessary special property statements based on criteria including, but not limited to: a. User-defined coding structure such as Record Type b. Accnt/Form Type		Must Have	Property Statements would be generated based on the account coding such as Record Type and Account Form.
4	1.6.6.2	The System shall have the capability to generate and distribute special business property statements		Must Have	Please see the response in 1.6.6.1
4	1.6.6.3	The System shall have the capability to notify authorized users about the creation of Special Property Statements and provide the capability for them to review and approve those statements		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.6.7**	**Receive & Process Business Property Statements**			
4	1.6.7.1	The System shall have the capability to validate property statements submitted through the Web Portal, SDR, or ESDR and identify whether valuations can be accepted or which staff should review the statement based on criteria including, but not limited to:		Must Have	This request will be fulfilled via the proposed web portal.
4		a. Reported valuation thresholds			Please see the response in 1.6.7.1
4		b. Reports of personal property of an assessed value less than a preconfigured value per assessee			Please see the response in 1.6.7.1
4		c. Preconfigured list of exception business classification codes			Please see the response in 1.6.7.1
4		d. Business property history			Please see the response in 1.6.7.1
4		e. Business type			Please see the response in 1.6.7.1
4		f. Reported property type			Please see the response in 1.6.7.1
4		g. Territory			Please see the response in 1.6.7.1
4		h. Change in address			Please see the response in 1.6.7.1
4		i. Ownership changes	Flag/Alert user of possible changes (secured or unsecured)		Please see the response in 1.6.7.1
4		j. Date started at this location	Flag/Alert user that the account may have escaped taxes based on the date		Please see the response in 1.6.7.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.7.2	The System shall have the capability to identify significant variances between current and prior year submissions based on preconfigured business rules	Business Rule : Alert user when reported cost / assessed value is outside of a defined range	Must Have	This functional request could be configured into the proposed solution's Workflow Subsystem and could also be configured to be user definable.
4	1.6.7.3	The System shall provide the capability for authorized users to review all available information including, but not limited to:		Must Have	This functional request is all part of the proposed solution's Personal Property system which would be implemented in Phase 1 of the Project.
4		a. Existing and pending Leasehold communiques			Please see the response in 1.6.7.3
4		b. Prior years history and statements			Please see the response in 1.6.7.3
4		c. Current or most recent audit if applicable			Please see the response in 1.6.7.3
4		d. Current year assessment			Please see the response in 1.6.7.3
4		e. All correspondences			Please see the response in 1.6.7.3
4	1.6.7.4	The System shall provide authorized users with the ability to select to send a "Leasehold Communique" as preconfigured in the System	The system should allow the leasehold communique to be initiate by auditors as well as by appraisers.	Must Have	This function would be fully available in the proposed solution
4	1.6.7.5	The System shall have the capability to create a Work Item that is equivalent to the "Leasehold Communique", in the Real Property Staff Work Queue based on the pre-configuration in the system.	This is instead of Personal Property Staff sending a notification("Leasehold Communique") via the system. The System shall provide the auhtorized user to turn-off this feature, on a need basis	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.7.6	The System shall associate every leasehold communique with a related real property parcel number and a business property account	In all cases the parcel should relate to an account.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.7.7	The System shall provide the ability for authorized users to review and edit all valuations before it gets saved to the system including capturing whether valuations were System or staff accepted	Should be done at time of assessment, not at the end of the enrolling period	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.7.8	The System shall provide the capability for authorized users to search/select/update business property statements for the current year based on prior year filings		Must Have	This function would be fully available in the proposed solution
4	1.6.7.9	The System shall provide the capability for authorized users to upload scanned business property statements		Must Have	This function would be fully available in the proposed solution
4	1.6.7.10	The System shall provide the capability for the authorized user to indicate/flag all the accounts with property statements that have information under Part III	This Functionality is very useful to discover a lot of new lessors	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.7.11	The System shall provide the capability for authorized users to maintain, edit, or update business valuation factors provided by the BOE		Must Have	This function would be fully available in the proposed solution
3	**1.6.8**	**Secured Unprocessed/Non-Fliers**			
4	1.6.8.1	The system shall have the capability to flag habitual non-filers by the pre-defined deadline(s)		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.8.2	The System shall have the capability to identify the secured property owner of a parcel that is related to the business property account by the pre-defined deadline(s)	The system should check whether the owner of the Business Property Account is the same as owner of the parcel and flag it	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.8.3	The System shall have the capability for the authorized user to derive the value same as last year including penalty (R&T Code 463) or Assessing the prior years and factoring with the current years factors and then adding the penalty, if the trended cost is over $50,000		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.8.4	The system shall provide the capability for the authorized users not to add the penalty for those that were nonfilers in the previous year.		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.8.5	The System shall provide the capability to identify if a secondary review is necessary according to preconfigured business rules including, but not limited to:		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Overall current year valuation is different than a predetermined threshold			This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.8.6	The System shall have the capability to calculate and save the current year valuation by the pre-defined deadline(s) based on preconfigured business rules	Business Rules are based on: 1. Internal Value sources 2. External value sources 3. Penalty application	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.6.9**	**Unsecured Unprocessed/Non-Fliers**			
4	1.6.9.1	The System shall have the capability to identify unsecured unprocessed/non-filers according to preconfigured business rules upon request or as scheduled in the System by the pre-defined deadline(s)	Business Rules: 1. Based on a range of values 2. Special Property assignment 3. Territory assignment	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.9.2	The System shall provide the authorized users with links to relevant outside research locations including, but not limited to:		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Commonly used websites			This requested feature will be delivered as a constituent working function of the final delivered System.
4		b. Federal/State/Local-government provided online tools			This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.9.3	The System shall have the capability to identify if the overall current year valuation is greater than a predetermined threshold		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.9.4	The System shall have the capability to calculate and save the current year valuation by the pre-defined deadline(s) based on preconfigured business rules	Business Rules are based on: 1. Internal Value sources 2. External value sources 3. Penalty application	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.6.10**	**Direct Assessments**			
4	1.6.10.1	The System shall have the capability to identify new and existing direct assessment records based on preconfigured business rules	Business Rules include but not limited to : 1. No changes for the past 2-4 years 2. Value restriction (need the capability for authorized users to define the value) 3. Single location 4. Does not have leasehold structures 5. Based on certain record types	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.10.2	The System shall have the capability to identify accounts that have been receiving direct assessments for greater than a predefined number of years and send property statements in lieu of direct assessment notices (DAB)		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.10.3	The System shall have the capability to track the number of years that an account has been under direct assessment processing		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.10.4	The System shall have the capability to process direct assessment accounts including, but not limited to:		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Decreasing the valuation by a preconfigured factor for each direct assessment record type as scheduled in the System	The system shall have the capability : 1. for an authorized user to configure the value of the factor		Please see the response to 1.6.10.4
4		b. Identifying accounts that fall below minimum billing value			Please see the response to 1.6.10.4
4		c. Generating a file of secured and unsecured records			Please see the response to 1.6.10.4
4	1.6.10.5	The System shall have the capability to remove properties from direct assessment when it no longer meets direct assessment criteria	Criteria includes but not limited to: 1. No changes for the past 2-4 years 2. Value restriction (need the capability for authorized users to define the value) 3. Single location 4. Does not have leasehold structures 5. Based on certain record types 6. The owner moved to a new location 7. Change in ownership of the business	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.10.6	The System shall have the capability to generate and distribute Direct Assessment notices	The System shall have the capability to create notices, calculate postage and send data file to vendor	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.6.11**	**Business Personal Property Audits**			
4	1.6.11.1	The System shall provide the capability for authorized users to select business properties for auditing based on various pre-defined criteria	Criteria based on Revenue & Taxation Code rules.	Must Have	This function would be part of the proposed solution's Workflow Subsystem
4	1.6.11.2	The System shall also have the capability for authorized users to generate the list of accounts that need to be selected for audits based on different criteria	For e.g.: For California County Case Audits – Out of state audits, the list of accounts are needed by mid-January and the authorized users should be able to query the system based on Geographical codes and pull out the out of state audit candidates.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.11.3	The System shall have the capability to identify and generate workflows for necessary business property audits on a preconfigured schedule based on preconfigured business rules and criteria	Schedule - end of June Criteria includes but not limited to : 1. Every 4 years 2. Based on the R & T Code rules	Must Have	Please see the response in 1.6.11.1
4	1.6.11.4	The System shall provide the capability for authorized users to perform an audit and document audit findings for each year indicated in the System	Example of current criteria : 50% of the highest value taxpayers and 50 % of the discretionary taxpayers (all other accounts))	Must Have	Please see the response in 1.6.11.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.11.5	The System shall provide the capability for authorized users to select to generate a waiver to extend the statute of limitations if the user is unable to perform the audit within the legal time limit	It is by law that the audit needs to be completed within 4 years and if not it expires unless the Auditor issues a waiver and the Assessee agrees(After 4 years, the earliest year will expire without the waiver- R&T Code 532 & 75.11 for escapes or supplemental assessments, 5097 & 2635 for refunds).	Must Have	Please see the response in 1.6.11.1
4	1.6.11.6	The System shall have a capability for the authorized user to indicate that an account has a Waiver and also store the expiration date of the Waiver		Must Have	Please see the response in 1.6.11.1
4	1.6.11.7	The System shall have the capability to alert authorized users about waivers(linked to accounts) that are expiring within a pre-defined time frame and/or the system shall have the capability for the authorized user to generate a list of accounts that have waivers expiring within a pre-defined time frame		Must Have	Please see the response in 1.6.11.1
4	1.6.11.8	The System shall generate, prepopulate, and send business property audit correspondence from saved templates as selected by an authorized user including, but not limited to:	The system shall have the capability to interface with document repository	Must Have	The proposed solution would have the ability to generate a virtually unlimited number of templates into taxpayer correspondence. The specific requirement the county may require some first-hand analysis as it relates to the final configuration and setup in this request.
4		a. Business property audit notification			Please see the response in 1.6.11.8
4		b. Business property audit findings notification			Please see the response in 1.6.11.8
4	1.6.11.9	The System shall enable authorized users to upload documents (different types) related to the audit activity	Receive documents/data electronically	Must Have	The proposed solution would perform this function by tracking all account audit history and applying the given rules to select accounts for audit.
4	1.6.11.10	The System needs the ability to select accounts due for audit based on preconceived rules, and to track audit results		Must Have	The proposed solution would perform this function by tracking all account audit history and applying the given rules to select accounts for audit.
4	1.6.11.11	The System shall have the capability to alert authorized users about audits(linked to accounts) that are on hold and/or the system shall have the capability for the authorized user to generate a list of accounts that have the audits on hold		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.6.12**	**Post Audit Processing**			
4	1.6.12.1	The System shall have the capability to evaluate the type of audit that has been completed and perform the relevant actions according to preconfigured business rules including, but not limited to:		Must Have	The proposed solution's Audit Utilities are flexible, but may require some configuration and/or modification depending on the county specific requirements.
4		a. Updating the System and saving the information including, but not limited to:		Must Have	This function would be part of the proposed Audit Utilities design as it relates to the overall proposed solution
4		1. Completion date		Must Have	Please see the response in 1.6.12.1a
4		2. Status		Must Have	Please see the response in 1.6.12.1a
4		3. Adjustments to costs		Must Have	Please see the response in 1.6.12.1a
4		b. Populating the roll correction/board change (decrease) and stipulation (if an appeal is relevant) if the audit type was a Board Change		Must Have	Please see the response in 1.6.12.1a
4		c. Completing the escape assessment record if the audit type was an Escape		Must Have	Please see the response in 1.6.12.1a

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.12.2	The System shall have the capability to populate post-audit notification letter(s) based on the audit results including, but not limited to:		Must Have	This functional request would be performed via the underlying use of a 'mail merge' process.
4		a. Separate letters for Escapes, Refunds etc.		Must Have	Please see the response in 1.6.12.2
4		b. Separate letters for each affected location		Must Have	Please see the response in 1.6.12.2
4		c. Refund letters to indicate NO Appeal rights			Please see the response in 1.6.12.2
4		d. Net Refund/Escape letters to indicate appeal rights	Net Refund - There was a refund and an escape and the Net result is a Refund		Please see the response in 1.6.12.2
4	1.6.12.3	The system shall have the capability for an authorized user to input an alternative address for the post-audit notification letter	The system shall also allow the authorized user to update the original address, if necessary	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.12.4	The System shall have the capability to evaluate if an extended hold is applicable		Must Have	The proposed solution's exclusive Step-Level-Processing via the Account Status code would provide this functionality.
4	1.6.12.5	The System shall have the capability to release account holds as preconfigured or selected in the System	Criteria : 1. 10 days from the post-audit letter date The system shall also have the capability for an authorized user to update the hold status	Must Have	Please see the response in 1.6.12.4
3	**1.6.13**	**Aircraft Discovery**			
4	1.6.13.1	The System shall have the capability to notify County Airports and Fixed Based Operators of the annual discovery process on a pre-configured date as initiated by an authorized user	The system shall provide the capability to authorized users to configure this date Date as of now is Dec 15th	Must Have	This functional request would be performed via the underlying use of a 'mail merge' process design and appropriate account selection would be based on the county's selection criteria.
4	1.6.13.2	The System shall have the capability for the authorized user to create & maintain the Fixed Based Operator database	The authorized user should be able to update the data set depending on the need	Must Have	Please see the response in 1.6.13.1
4	1.6.13.3	The System shall have the capability to generate and send a discovery request to the Airport & FBO including, but not limited to:		Must Have	Please see the response in 1.6.13.1
4		a. Aircraft listing request		Must Have	Please see the response in 1.6.13.1
4		b. Instructions to provide information on the web portal or via other means	Information provided by the fixed based operators will be N# (tail #), owners name, address, tie down #	Must Have	Please see the response in 1.6.13.1
4	1.6.13.4	The system shall have the capability for an authorized user to upload the aircraft listing data		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.13.5	System shall have the capability to compare prior year and current year aircraft listing and discover : 1. New aircraft in county on lien date 2. The changes in Aircraft location such as tie-down hanger or airports(within the county) or out of county		Must Have	Experience garned by Hamer that will be shared for implementation in the new proposed system includes this request and these other capabilities: The automatic aging of vessel/aircraft for the next tax year period, Ownership verification processing, Dock/airport walks, Marina/Airport profiles can be created for enhanced valuation support, DMV processing and Coast Guard processing, The total System is completely table driven, establishing high confidence data integrity, Unlimited multi-year history, audit history and file maintenance, Complete integrated tracking from Assessor to Auditor to Tax Collector, Direct billing, Penalty billing which is controlled by Assessor, and therefore not controlled or mandated by batch jobs, On demand printing of property statements, Integrated-relational Address Book functionality, User defined step-level processing; i.e., Business statement processing - sent, received, processed, reviewed, approved and billed, Working roll, current year roll and prior year(s) roll can all be worked simultaneously, Swapping/Copying capabilities are highly enhanced for all data, this reduces data entry for new businesses, and improves overall workflow, Items can be billed daily, weekly, monthly or as the client may choose, Lookup of boat/aircraft can be by: boat or aircraft owner name, location, bill number or a variety of field identifiers, Items in Cooperative Mandatory Audit can be tracked, Unlimited notes for APNs, Unlimited notes for auditors
3	**1.6.14**	**General Aircraft Valuation**			
4	1.6.14.1	The System shall have the capability to generate an aircraft property statement pre-populated with any available current year information for all active or new Aircraft Owners in the System		Must Have	The proposed solution would generate Aircraft Property Statement and allow the taxpayers to automatically download a prepopulated version

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.14.2	The System shall have the capability to generate a new account number based on pre-defined business rules, once a property owner has submitted aircraft reference information for a new aircraft	The System shall have the capability for the authorized user to override the newly generated account number before saving the information into the System	Must Have	Experience garned by Hamer that will be shared for implementation in the new proposed system includes this request and these other capabilities: The automatic aging of vessel/aircraft for the next tax year period, Ownership verification processing, Dock/airport walks, Marina/Airport profiles can be created for enhanced valuation support, DMV processing and Coast Guard processing, The total System is completely table driven, establishing high confidence data integrity, Unlimited multi-year history, audit history and file maintenance, Complete integrated tracking from Assessor to Auditor to Tax Collector, Direct billing, Penalty billing which is controlled by Assessor, and therefore not controlled or mandated by batch jobs, On demand printing of property statements, Integrated-relational Address Book functionality, User defined step-level processing; i.e., Business statement processing - sent, received, processed, reviewed, approved and billed, Working roll, current year roll and prior year(s) roll can all be worked simultaneously, Swapping/Copying capabilities are highly enhanced for all data, this reduces data entry for new businesses, and improves overall workflow, Items can be billed daily, weekly, monthly or as the client may choose, Lookup of boat/aircraft can be by: boat or aircraft owner name, location, bill number or a variety of field identifiers, Items in Cooperative Mandatory Audit can be tracked, Unlimited notes for APNs, Unlimited notes for auditors
4	1.6.14.3	The System shall have the capability of creating an account number not based on the N#	For PI only accounts(when there is only tie-downs and no aircraft)	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.14.4	The System shall have the capability to update records with the information from the completed aircraft property statements		Must Have	This functional request to complete an Aircraft statement will be built into the proposed web portal.
4	1.6.14.5	The System shall have the capability to generate/calculate and display aircraft valuation for review including, but not limited to:		Must Have	This functional request and all of its subordinate requests would available in the currently proposed solution design.
4		a. Current year filing status			Please see the response in 1.6.14.5
4		b. Current year filing values if available			Please see the response in 1.6.14.5
4		c. Prior year valuations			Please see the response in 1.6.14.5
4		d. "Aircraft Bluebook" valuations	The system have access to the Aircraft Bluebook		Please see the response in 1.6.14.5
4		e. Aircraft data			Please see the response in 1.6.14.5
4	1.6.14.6	The System shall have the capability to store aircraft reference information including, but not limited to	This information will be used by the authorized user as a reference to the aircraft for valuation purposes	Must Have	This functional request and all of its subordinate requests would available in the currently proposed solution design.
4		a. Tail number			Please see the response in 1.6.14.6
4		b. Original sales price			Please see the response in 1.6.14.6

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		c. Model			Please see the response in 1.6.14.6
4		d. Make			Please see the response in 1.6.14.6
4		e. All data elements listed on Aircraft Property Statement			Please see the response in 1.6.14.6
4		f. Final sales Price			Please see the response in 1.6.14.6
4		g. Date/year aircraft was sold and sales price			Please see the response in 1.6.14.6
4	1.6.14.7	The System shall have the capability to evaluate the variation between current and past valuations and route accounts above a certain pre-defined threshold for review	The system shall have the capability for the authorized user to input the threshold	Must Have	This will be part of the proposed solution.
4	1.6.14.8	The System shall have the capability to support aircraft valuation when aircraft owners do not respond including, but not limited to:		Must Have	The proposed solution would support valuation for non-filers.
4		a. Valuing the aircraft based on the prior year's filing data if available			Please see the response in 1.6.14.8
4		b. Retrieving relevant valuation information from the "Aircraft Bluebook"			Please see the response in 1.6.14.8
4		c. Prompting the designated user to review the FAA records			Please see the response in 1.6.14.8
4		d. Indicating that the Aircraft Owner has not responded			Please see the response in 1.6.14.8
4	1.6.14.9	The System shall have the capability to calculate possessory interest for the aircraft tie-down based on known factors and preconfigured business rules	Known Factors & Business Rules : PI value is calculated as Monthly rent * factor (a mathematical value entered by the Auditor-Appraiser)	Must Have	This will require some first-hand analysis of the current proposed PI module design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System
4	1.6.14.10	The System shall have the capability to transfer data from the FAA System or retrieve information from the FAA website		Must Have	This functon will be performed via an API.
3	**1.6.15**	**Boat Discovery Annual**			
4	1.6.15.1	The System shall have the capability to generate and send discovery notification(s) including, but not limited to the below list, electronically/U.S. Mail, on a preconfigured date to the Marinas	1. The system should provide a functionality to the authorized users to maintain the contact information(e-mail id, address, phone etc.) of the Harbor Masters 2. The system should interface with the document repository to get the letter format and send it out to the harbor master of each harbor within our county 3. The date on which the letter should be sent on is Dec 15th for the next year data but the authorized user should be able to configure this in the System	Must Have	The proposed system design currently provides for the requested notifications modalities requested, however, some of the requested business rules will require some first-hand analysis. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Vessel listing request			This function would be currently available in the proposed solution design.
4		b. Instructions to provide back the information	E.g.: Provide information back via the web portal or via e-mail or via other means		This will require some first-hand analysis of the currently proposed module that would manage discovery notifications. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.15.2	The System shall have the capability to load and save the data that is provided back by the Marinas		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.6.16**	**Boat Discovery Monthly**			
4	1.6.16.1	The System shall have the capability to download & save a monthly data file from the DMV/other Counties including, but not limited to:	The system shall have the capability to transfer data from/to external systems like DMV/Other Counties	Must Have	The proposed system design would be able store various types of documents relating to individual accounts or a whole Subsystem such as Marine Accounts.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. New boats			Please see the response in 1.6.16.1
4		b. Moved boats			Please see the response in 1.6.16.1
4		c. Information changed about boats			Please see the response in 1.6.16.1
4	1.6.16.2	The System shall have the capability to update the boat records with the changed information from the DMV/other counties without overriding or losing prior information	The key field that the system should use to make this connection is : Coast Guard document # or DMV Certificate #. The system should have the capability to create an arbitrary County id #	Must Have	The Multi-Year Assessment History in in the proposed solution design would ensure that historical data will be saved and not affected by current changes.
4	1.6.16.3	The System shall have the capability to generate and send vessel property statements for new Boat Owners or Boats that have had information changed in the DMV record	The system should interface with the document repository to get the vessel property statement template(BOE Template) and send it out to the boat owners	Must Have	The ability to complete and/or download a hardcopy of a Vessel Property statement will be built into a future version of the web portal. The proposed solution can also use 'Mail-Merge' and a preconfigured statement creation utility to generate Vessel Statements.
4	1.6.16.4	The System shall have the capability to identify boats with value less than a preconfigured threshold and exclude them from the current year valuation processes	The current threshold is $7500	Must Have	This is a current function of the proposed solution design.
4	1.6.16.5	The System shall provide the capability to authorized users to input/change preconfigured thresholds and maintain a history of previously configured criteria and thresholds		Must Have	This is functionaly is provided in the proposed solution's Workflow Subsystem design.
3	**1.6.17**	**New and MBT Boat Valuation**			
4	1.6.17.1	The System shall have the capability to update existing boat information with any changed information from the returned vessel property statements	Information includes, but not limited to: Owner Name, Mailing Address, Situs Address, vessel characteristics (hull type, engine, etc.),	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.17.2	The System shall generate initial boat values based on the returned vessel property statements and preconfigured criteria	Criteria to come up with the initial value is described in the Vessel valuation guides BUC or Nada. An initial value could come based on the rules specified in these sources(the purchase price that the owner has specified in the vessel property statement can also be a possible factor)	Should Have	This is a current function of the proposed solution design.
4	1.6.17.3	The System shall have the capability to validate boat information for criteria including, but not limited to:		Must Have	This functionaly would be provided in the proposed solution's Workflow Subsystem.
4		a. Boat value greater than a preconfigured threshold			Please see the response in 1.6.17.3
4		b. Boat value less than a preconfigured threshold			Please see the response in 1.6.17.3
4		c. Identifying if the boat is in a County or Government Marina			Please see the response in 1.6.17.3
4		d. Identifying any relevant exemptions	1. Military Exemptions 2. Veteran's Exemption 3. Home Owner Exempt.(Only if the owner lives on the boat) 4. 4% Commercial Exemptions 5. Welfare Exemption		Please see the response in 1.6.17.3
4		e. Store all data elements listed on Vessel Property Statement			Please see the response in 1.6.17.3

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.17.4	The System shall have the capability for the authorized user to input the factor required for the calculation of possessory interest for the boat berth	The authorized user here is the PI Appraiser	Must Have	This will require an on-site detailed analysis of the County requirements and the multi-variates as it relates to an implementation of a final solution. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.17.5	The System shall have the capability to calculate possessory interest for the boat berth based on pre-defined factors and preconfigured business rules	Known Factors & Business Rules : 1. The boat is in a Public Marina 2. Monthly berth Rent * Factor	Must Have	Please see the response above.
4	1.6.17.6	The System shall have the capability to display the relevant boat valuation information including, but not limited to:		Must Have	As we understand the requested function, the given details indicated that this functionality is part of the Vessel Multi-Year History in the proposed solution. Nevertheless, this requested comprehensive feature will be delivered as a constituent working function of the final delivered System.
4		a. The valuation			Please see the response in 1.6.17.6
4		b. The valuation calculation			Please see the response in 1.6.17.6
4		c. Possessory interest calculations (if applicable)			Please see the response in 1.6.17.6
4		d. NADA valuation information			Please see the response in 1.6.17.6
4		e. BUC valuation information			Please see the response in 1.6.17.6
4	1.6.17.7	The System shall have the capability for the authorized user to edit/override the boat valuation information		Must Have	The system will have the capability of allowing authorized users to override the system generated value where necessary and in accordance with California Law.
3	**1.6.18**	**Annual Existing Boats <$100K(PBT Boats)**			
4	1.6.18.1	The System shall provide authorized users with the ability to input the Mass Boat Appraisal Factor that they derive based on available data including, but not limited to information from:		Must Have	As we understand the requested function this request would be part of the Vessel Value Calculation utility in the proposed solution design.
4		a. BOE			Please see the response in 1.6.18.1
4		b. Other Counties			Please see the response in 1.6.18.1
4		c. Appraiser conducted surveys/research			Please see the response in 1.6.18.1
4	1.6.18.2	The System shall provide authorized users with the ability to re-value any qualifying vessels based on the new mass boat appraisal factor		Must Have	Please see the response in 1.6.18.1
4	1.6.18.3	The System shall have the capability to identify boat records that have not received a current year assessment		Must Have	Please see the response in 1.6.18.1
4	1.6.18.4	The System shall have the capability to calculate and assign boat values for the current year for all records identified as not having received a current year assessment according to preconfigured business rules including, but not limited to:		Must Have	Please see the response in 1.6.18.1
4		a. Marking the boat as not assessable for the current year and saving a $0 assessment value for the boat for all boats with a value less than the preconfigured valuation threshold			Please see the response in 1.6.18.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		b. Calculating possessory interest for the boat berth for boats listed in a County or Government Marina			This will require an on-site detailed analysis of the County requirements and the multi-variates as it relates to an implementation of a final solution. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		c. Adding a penalty if the Authorized User chooses to do so			The system will have the capability of allowing authorized users to override the system generated value where necessary and in accordance with California Law.
3	**1.6.19**	**Leased Equipment Discovery**			
4	1.6.19.1	The System shall provide the ability for authorized users to create the leasing account(s) in the System with lessors identified via means including, but not limited to:		Must Have	This functionalty would be part of the the proposed solution.
4		a. Part III on a business property statement			Please see the response in 1.6.19.1
4		b. Audit activity			Please see the response in 1.6.19.1
4		c. Self-reporting from a leased equipment statement			This is a current function in the proposed solution.
4		d. BOE updates			The proposed solution provides for the import of BOE updates.
4		e. Taxpayer referral/ Referral from other counties			Please see the response in 1.6.19.1
3	**1.6.20**	**Leased Equipment Mailing**			
4	1.6.20.1	The System shall have the capability for authorized users to approve the creation and sending of the business property leasing statements to Lessors identified in the System		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.20.2	The System shall have the capability to generate and send business property leasing statements to Lessors identified in the System	The letter will state to log into a web portal and a formatted excel worksheet will be uploaded into the portal. Also the leasing 571-L form will accessed through the portal. i.e. ESDR.	Must Have	This functional request could be performed in mass via the proposed system where the taxpayer downloads a prepopulated hardcopy.
3	**1.6.21**	**Leased Equipment Processing**			
4	1.6.21.1	The System shall have the capability to associate returned leasing/vending statements with existing Lessor and Lessee account numbers		Must Have	This functionality would be provided via the proposed system's Lease Reconciliation Module design.
4	1.6.21.2	The System shall have the capability to assign numbers to new accounts when the returned leasing/vending statement does not have an existing account number		Must Have	The proposed solution would be able to automatically generate an Account Number assignment via a utility that uses the given user criteria as well as other numbers if needed.
4	1.6.21.3	The System shall have the capability to place new accounts in a holding queue for authorized user review and approval when the returned leasing/vending statement does not have an existing account number		Must Have	This functionaly would be provided in the proposed solution's Workflow Subsystem.
4	1.6.21.4	The System shall have the capability to create a new account number or new location/branch as approved by an authorized user		Must Have	Please see the response in 1.6.21.2
4	1.6.21.5	The System shall have the capability to evaluate the filing for elements including, but not limited to:	System should be able to recognize lessees already in he system and give to auditor to approve valuation	Must Have	This request would be fulfill via the proposed solution
4		a. Conditional sale			Please see the response in 1.6.21.5
4		b. Lease purchase			Please see the response in 1.6.21.5
4		c. Bank or financial institution			Please see the response in 1.6.21.5
4		d. True lease			Please see the response in 1.6.21.5

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.6.21.6	The System shall apply preconfigured valuation rules to equipment types and quantities uploaded from the provided excel spreadsheet including, but not limited to the below list, and then calculate values:		Must Have	This function would be included in the proposed solution's Asset Detail Trending/Aging module design. Uploading a spreadsheet would require some first-hand analysis in order to fulfill the county's specifications. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Asset life			Please see the response in 1.6.21.6
4		b. Asset factors			Please see the response in 1.6.21.6
4		c. By city/TRA	True lease assessment is separated by city/TRA for assessment purposes		Please see the response in 1.6.21.6
3	**1.6.22**	**Hand Bills**			
4	1.6.22.1	The System shall have the capability to receive the Hand Bill Requests from the Tax Collector's Office	Send correspondence as appropriate	Must Have	This would be an API that would need to be developed with the assistance of the Tax Office and their vendor
4	1.6.22.2	The System shall have the capability to review hand bill requests and identify the elements including, but not limited to:		Must Have	The proposed system will be able print on-demand statements for any Assessment or Working Roll
4		a. Existing accounts			Please see the response in 1.6.22.2
4		b. Possessory Interest components			Please see the response in 1.6.22.2
4		c. Roll status for the request			Please see the response in 1.6.22.2
4		d. Escrow statement			Please see the response in 1.6.22.2
4		e. Prior assessment			Please see the response in 1.6.22.2
4		f. All statement types	E.g. : - "571L"		Please see the response in 1.6.22.2
4		g. Assessment history			Please see the response in 1.6.22.2
4		h. Assessment of Multiple Years needed?			Please see the response in 1.6.22.2
4		i. Hand bill value			Please see the response in 1.6.22.2
4	1.6.22.5	The System shall have the capability to save the new owner information and any other new changes identified from hand bill request temporarily within the system until a confirmation is received	Based on the confirmation from Tax Collector/Escrow Company	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.22.6	The System shall have the capability to rollback the new owner information and any other new changes that are saved temporarily within the system, if the Escrow does not go through	Based on the confirmation from Tax Collector/Escrow Company		This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.6.22.7	The System shall prompt the designated user to review and update owner information and any other new changes identified from hand bill requests when changes are confirmed	Based on the confirmation from Tax Collector/Escrow Company	Must Have	This would be functionaly provided in the proposed solution's Workflow Subsystem.
4	1.6.22.8	The System shall have the capability to generate a letter to request asset sale allocation from escrow company when applicable		Must Have	This is a current function of the proposed solution design.
4	1.6.22.9	The System shall have the capability for the authorized user to input the asset sale allocation from escrow company		Must Have	This is a current function of the proposed solution design.
2	**1.7**	**Roll Management**			
3	**1.7.1**	**Roll Corrections and Escapes**	**These requirements include both Real Property and Business Personal Property. Some examples are specific to Real Property and some others are specific to BPP**		

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.1.1	The system shall have the capability to identify the assessments related to the Roll Correction/Escapes that affects the closed rolls based on pre-defined business rules	Example: Processing of Change in Ownership event in the past, Discovery of construction in the past, Change in base year, a past assessable event becomes retroactively excluded or exempt, BPP Specific Examples - Amendment of Property Statement, Underreporting, Location Change Note:-> For Business Personal Property Escape Processing, the enrollment of Escape is done in the current roll with the appropriate assessment year/tax rate. This process is different from Real Property Escape Processing where the Roll Correction takes place in the past Roll corresponding to the assessment year	Must Have	This will be addressed by maintaining the 3 rolls, current year secure and unsecure, supplemental roll, and escape roll all in the same DB structure with logic built into the data and intermediary layers of the system. This will help facilitate the crucial integration between these three rolls and the events past or present that lead to modifications in each based off of business rules and California Law. Sapient understand that these rolls are the fundamental element or the heartbeat of the system. As it beats these rolls are continuously updated as required.
4	1.7.1.2	The System shall have the capability for the authorized user to select the various attributes that control the roll correction/escapes	Examples of Attributes: 1. Error Code (i.e. Assessee or Assessor Error) 2. The statute of limitation controlling the number of years that can be corrected 3. Penalty and Interest Code 4. Cancelling the assessment	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.3	The system shall have the capability to create Roll correction/escape assessments for a retroactive assessment	If property escapes assessment, the assessor is required to value the property upon discovery for the appropriate valuation date, enroll the value on the roll being prepared, process any necessary correction to the current roll and process appropriate escape assessments for prior years within the statute of limitations The System should also identify Assessment year applicable & use proper tax rate and applicable interest During the creation of the roll correction/escape, the system shall prompt the user to select the reason/error code(R&T Code) from a pre-defined list.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.4	The System shall have the capability to route completed roll corrections/escapes(but before sending the values to the Controller) for additional approvals based on preconfigured criteria including, but not limited to:		Must Have	This is configurable function that is performed through the proposed solution's Workflow Subsystem.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. Assessed value	Based on the significance of the value(i.e. if the value is greater than a pre-defined amount), additional levels of approvals may be required		Please see the response in 1.7.1.4
4		b. Property type			Please see the response in 1.7.1.4
4		c. Tax change threshold			Please see the response in 1.7.1.4
4	1.7.1.5	The System shall have the capability to generate and send roll correction/escape notices from saved templates as selected by an authorized user including, but not limited to:	The notice shall be sent via: 1. E-mail - for assesses who have opted in for e-mail notifications 2. U.S. Mail For Roll Correction, only one notice will be generated For Escapes, 2 notices shall be generated: 1. Proposed 2. Enrollment of Escapes(to be sent after 10 days of the first notice date).	Must Have	This is a current function of the proposed solution design.
4		a. Supplemental notices	Only for Real Property		Please see the response in 1.7.1.5
4		b. Roll correction notice	Only for Real Property		Please see the response in 1.7.1.5
4		c. Escape notices	Proposed Escape Notice, Notice of Escape enrollment		Please see the response in 1.7.1.5
4		d. Base year changes	Only for Real Property		Please see the response in 1.7.1.5
4	1.7.1.6	The system shall have the capability to cancel existing supplemental(s), create/modify and reprocess all the subsequent event(s) that are affected by the roll correction/escape	Examples of a subsequent event for Real Property: another CIO, Calamity, Construction, Decline in Value, TRA change etc.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.7	The system shall have the capability for the authorized user to put the roll correction/escape on hold anytime prior to it being released to the Controller and release it	The System shall have the capability to put the roll correction/escape on hold until property owner response is received, a preconfigured date(as per the R&T Code) has passed, or until changed by an authorized user	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.8	The System shall allow the authorized user to modify the roll correction/escape value before releasing to the Controller's office(including while it is on hold)		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.9	The system shall recalculate the roll correction/escapes and generate new notices when an authorized user modifies the values before releasing to the Controller's office		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.10	The system shall have the capability to notify the relevant authorized users about the properties that they have put on holds		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.11	The system shall have the capability for the authorized user to release the hold on the roll correction/escape		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.1.12	The System shall have the capability to apply approved static roll correction and correction that carry forward as applicable	Static Roll Correction is the roll correction that affects only one roll. E.g.: Roll Correction due to appeals, decline etc.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.13	The System shall provide the capability to propagate the CPI factors(for Real Property)/Trend factors(for Business Personal Property) for all applicable years of the roll correction/escapes [until a new event occurs or until open roll which ever comes first, in the case of Real Property]		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.14	The system shall have the capability to route roll correction/escapes to the Controller's office after a pre-configured waiting period or when the authorized user indicates	The waiting period depends on the type of change(roll correction or escape) Exceptions: When the roll correction/escape is created based on appeals then the system shall not release the records to the Controller	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.15	The system shall have the capability to lock the roll correction/escape records after release to the Controller		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.16	The System shall have the capability to alert if a business property roll correction/escape relates to real property and vice versa based on pre-defined rules		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.17	The System shall have the capability for an authorized user to cancel existing escapes and re-issue the escape as needed		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.18	The System shall have the capability for an authorized user to perform Roll Corrections on a retired parcel	The System shall have the capability to propagate the corrected value to subsequent years and all the affected parcels	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.1.19	The System shall have the capability to retain all the correction/cancellation history and make it available for review by authorized user		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		Additional Audit Escapes Requirements for Business Personal Property	Covered under Post Audit Processing Requirements		This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.7.2**	**Secured Value Transfer from Unsecured Master File**			
4	1.7.2.1	The System shall have the capability to identify business personal property records to transfer to the secured roll as identified by an authorized user in other processes		Must Have	This would be a current function of the proposed solution.
4	1.7.2.2	The System shall have the capability to display the identified transfers for review		Must Have	This function is accomplished via the proposed solution's Step-Level-Processing and Status Code Assignment design. Additionally, the proposed capability for 571 filings would also further enhances this functionality.
4	1.7.2.3	The System shall have the capability to transfer the selected business personal property values to the secured annual roll		Must Have	This would be functionaly provided in the proposed solution's Workflow Subsystem.
3	**1.7.3**	**Roll Close**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.3.1	The System shall have the capability to validate the data and provide error/audit reports before the preliminary roll close, based on pre-defined business rules	Examples of Business Rules: 1. Unless a qualified reassessment has taken place, the new factored base year value should not be more than the CPI factor published by the BOE	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.3.2	The System shall have the capability to enforce a freeze period for a pre-defined period of time before the preliminary roll close	During this freeze period, no user should be allowed to make changes to the data unless a special approval is given by the management	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.3.3	The System shall provide the capability for the authorized users approved by management to validate the data and make corrections before the preliminary roll close	Names, addresses, TRA, Values etc.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.3.4	The System shall have the capability to close preliminary roll when initiated by an authorized user	This preliminary Roll Close should be completed before July 2.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.3.5	The System shall provide the capability for the authorized users approved by management to validate the data and make corrections after the preliminary roll close	These corrections needs to be allowed by the system after the preliminary roll close happens. The value changes at this point of time is due to the Roll Corrections Names, addresses, TRA changes	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.3.6	The System shall have the capability to process Final Roll close	Final Roll Close takes place in Aug - Sep and applicable only for Secured	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.3.7	The System shall have the capability to produce roll close items to be completed and prompt the designated user to complete the items including, but not limited to:		Must Have	This would be functionaly provided in the proposed solution's Workflow Subsystem.
4		a. Roll Certificate			Please see the response in 1.7.3.7
4		b. Press release			Please see the response in 1.7.3.7
4		c. Roll Print			Please see the response in 1.7.3.7
4		d. BOE and other external agency reports			Please see the response in 1.7.3.7
4		e. Annual notices (secured only)			Please see the response in 1.7.3.7
4		f. Website and other public updates			Please see the response in 1.7.3.7
4		g. Annual reports			Please see the response in 1.7.3.7
4		h. Standard roll close reports			Please see the response in 1.7.3.7
4		i. Roll files	Certified Preliminary Roll, Final Roll, Roll files to Controller's office		Please see the response in 1.7.3.7
3	**1.7.4**	**Roll Open**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.4.1	The System shall automatically open a new roll for secured and/or unsecured roll, after a successful preliminary roll close.	While the system automatically opens a new Roll, it should reset data, dates, codes(penalty codes, mail codes) etc. and also perform predefined updates as applicable, based on roll type and preconfigured business rules including, but not limited to: a. Indicate a new roll year record "en-mass" for each active parcel as the current year record b. Updating the "roll over" activities and dates c. Applying projected factors (e.g.: CPI factor for Secured Roll -currently 2%, Trend factor for Unsecured Roll etc.) d. Beginning the assessment process e. Changing the roll year; f. Resetting status codes; g. Resetting values (only for Business Personal Property); h. Cleaning all dates; i. Cleaning all penalty codes; j. Cleaning all return mail codes; k. Resetting trend file flag;	Must Have	Please see the response in 1.7.3.7
4	1.7.4.2	When a new unsecured roll is open, the system shall have the capability to automatically update the TRA for the unsecured accounts and notify the authorized user of the status	For Unsecured Roll, the TRA information including prior year TRA list	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.7.5**	**Real Property Supplemental Roll**			
4	1.7.5.1	The system shall have the capability to create supplemental(s) when a reassessable event happens	Any assessable change in ownership, completion of new construction, change in use or calamity will trigger a Supplemental. Supplemental should not be created for items including but not limited to : 1. Boats 2. Fixtures 3. Properties subject to Williamson Act 4. Properties subject to Mills Act 5. Timberland Properties 6. Non-profit Golf courses 7. Section 11 properties - Municipally owned properties located outside the boundary of the municipality 8. State assessed properties 9. Business personal properties 10. Government owned properties 11. Prospective Relief(Restoring ownership to a prior point-in-time)	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.5.2	The system shall have the capability to create one or multiple supplemental depending on the event date	If the event date is between : 1. Jan 1 and May 31 then the system shall create 2 Supplementals - one for the current roll and second for the roll being prepared. 2. June 1 and Dec 31 then the system shall create 1 supplemental for the roll being prepared.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.3	When a supplemental is created, the system shall have the capability to generate supplemental notices and send to the assessee based on the pre-configured Business Rules	Example of the Business Rule is even when the supplemental is processed on the same day, the notices may have to go out on different days depending on the event date. The notice shall be sent via: 1. E-mail - for assesses who have opted in for e-mail notifications 2. U.S. Mail	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.4	The system shall have the capability for the authorized user to put the supplemental on hold anytime prior to it being released to the Controller and release it later	Due to various reasons, the appraiser may decide to put the supplemental on hold for further review.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.5	The System shall allow the authorized user to modify the property value before releasing to the Controller's office(including while it is on hold)		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.6	The system shall recalculate the Supplementals and generate new notices when an authorized user modifies the values before releasing to the Controller's office		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.7	The system shall have the capability to notify the relevant users about the properties that they have put on holds		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.8	The system shall have the capability for the authorized user to release the hold on the supplemental		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.9	The system shall have the capability to route Supplementals to the Controller's office after a pre-configured waiting period or when the authorized user indicates	The waiting period currently is minimum 30 days	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.10	The system shall have the capability to lock the supplemental records after release to the Controller		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.11	The system shall have the capability for an authorized user to cancel or cancel and re-issue a specific supplemental record, after release to the Controller	During the cancellation the system shall prompt the user to select the reason/error code from a pre-defined list. This may lead to the creation of a new supplemental record	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.12	The system shall have the capability for an authorized user to make corrections to supplemental roll, after release/enrollment to the Controller		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.13	When a supplemental roll correction takes place, the system shall have the capability to generate supplemental notices and send to the assessee	Exception: When the Supplemental Roll Correction(a board change, in this context) is done based on appeals then the system shall not generate notices.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.5.14	The System shall have the capability for an authorized user to perform Supplemental Roll Corrections on a retired parcel	The System shall have the capability to propagate the corrected value to subsequent years and all the affected parcels	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.15	The System shall have the capability to route Supplementals for additional approvals based on preconfigured criteria	For E.g.: All the Supplementals require Supervisor Approvals. If the value is greater than a pre-defined amount, it may require a second level (Chief Appraiser/ Deputy Assessor) approval.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.16	The System shall have the capability to retain all the correction/cancellation history and make it available for review by authorized user		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.5.17	The system shall have the capability to process Supplemental Roll Correction and release to the Controller based on pre-defined business rules	Example of the Business Rules: 1. If the refund amount is greater than a specific amount then it has to be approved by different authorities	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**1.7.6**	**Business Personal Property Supplemental Roll**			
4	1.7.6.1	The system shall have the capability to create supplemental(s) when a reassessable event happens based on the pre-defined business Rules	Examples of a reassessable events that will trigger a Supplemental: 1. Any leasehold improvements 2. Discovering new Lessees after the Tax Bill for the year has been issued. Example of a business Rule : The System shall have the ability to decide whether to create Supplemental(s) based on a value threshold	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.2	The system shall have the capability to create one or multiple supplemental depending on the event date	If the event date is between : 1. Jan 1 and May 31 then the system shall create 2 Supplementals - one for the current roll and second for the roll being prepared. 2. June 1 and Dec 31 then the system shall create 1 supplemental for the roll being prepared.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.3	When a supplemental is created, the system shall have the capability to generate supplemental notices and send to the assessee based on the pre-configured Business Rules and saved templates	Example of the Business Rule is even when the supplemental is processed on the same day, the notices may have to go out on different days depending on the event date. The notice shall be sent via: 1. E-mail - for assesses who have opted in for e-mail notifications 2. U.S. Mail	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.4	The system shall have the capability for the authorized user to put the supplemental on hold anytime prior to it being released to the Controller and release it later	Due to various reasons, the appraiser may decide to put the supplemental on hold for further review.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.5	The System shall allow the authorized user to modify the property value before releasing to the Controller's office(including while it is on hold)		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.7.6.6	The system shall recalculate the Supplementals and generate new notices when an authorized user modifies the values before releasing to the Controller's office		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.7	The system shall have the capability to notify the relevant users about the properties that they have put on holds		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.8	The system shall have the capability for the authorized user to release the hold on the supplemental		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.9	The system shall have the capability to route Supplementals to the Controller's office after a pre-configured waiting period or when the authorized user indicates	The waiting period currently is minimum 30 days	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.10	The system shall have the capability to lock the supplemental records after release to the Controller		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.11	The system shall have the capability for an authorized user to cancel, or cancel & re-issue a specific supplemental record, after release to the Controller	During the cancellation the system shall prompt the user to select the reason/error code from a pre-defined list. This may lead to the creation of a new supplemental record	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.12	The system shall have the capability for an authorized user to make corrections to supplemental roll, after release/enrollment to the Controller		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.13	When a supplemental roll correction takes place, the system shall have the capability to generate supplemental notices and send to the assessee	**Exception:** When the Supplemental Roll Correction(a board change, in this context) is done based on appeals then the system shall not generate notices(Statement of Change goes from AAB to Controller in this case).	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.14	The System shall have the capability for an authorized user to perform Supplemental Roll Corrections on a retired account	The System shall have the capability to propagate the corrected value to any subsequent years and all the affected accounts	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.15	The System shall have the capability to route Supplementals for additional approvals based on preconfigured criteria	For E.g.: All the Supplementals require Supervisor Approvals. If the value is greater than a pre-defined amount, it may require a second level (Chief Appraiser/ Deputy Assessor) approval.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.16	The System shall have the capability to retain all the correction/cancellation history and make it available for review by authorized user		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.7.6.17	The system shall have the capability to process Supplemental Roll Correction and release to the Controller based on pre-defined business rules	Example of the Business Rules: 1. If the refund amount is greater than a specific amount then it has to be approved by different authorities	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
2	**1.8**	**Appeals**			
3	**1.8.1**	**General Requirements for Appeals**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.8.1.1	The System shall have the capability to retrieve and save the appeals information from the AAB System		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.8.1.2	The System shall have the capability to compare the Applicant Name with the property owner name and flag the appeals record if the applicant is different from the owner		Could Have	This requirement could be supported. The design and development team would like to garner more first-hand details as it relates this requirment in the negotiation or discovery period in order to meet or exceed client expectations. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.8.1.3	The System shall have the capability to flag the duplicate appeals based on pre-defined criteria	Criteria includes, but not limited to : 1. Same APN 2. Same year (year of the appeal filing date)	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.8.1.4	The System shall have the capability for the authorized user to retrieve and review the history of all the appeals pertaining to any specific APN		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.8.1.5	The System shall have the capability to maintain the appeal assignment data with the ability for the authorized user to edit it	Appeal Assignment Data includes, but not limited to: 1. Appraiser Name etc. 2. Territory (E.g.: District/Neighborhood/City) 3. Appeal Type (E.g.: CIO , Personal Property) 4. Account type/ Property type	Must Have	The workflow manager will allow a principle or supervisor to override the data as needed. If this data change impacts the citizen, an alert will be sent to a user or automatically send an electronic mail to the citizen informing them of the information change if necessary.
4	1.8.1.6	The System shall have the capability to make the initial appeals assignments based on the pre-defined information		Must Have	The workflow manager logic will not only make these life cycle stages reviewable and notifiable, it will assign these stages to specific users with specific roles based on the applicable business rules.
4	1.8.1.7	The System shall have the capability for authorized users to make reassignments of the initial appeals assignments at any time	The System shall provide the capability to: 1. Reassign appeal assignments at any time(type a new Name or select from a list of names)	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System. This would trigger the appropriate actions from the workflow manager to notify the user that was reassigned the appeals case.
4	1.8.1.8	The System shall have the capability to automatically notify the new assignee(and the former assignee, in case of re-assignment) about the assignment		Must Have	See the response above
4	1.8.1.9	The System shall generate a prepopulated, editable draft of required documents and send appeals correspondence from saved templates as selected by an authorized user. Correspondence may include, but is not limited to: a. Initial request for information letter(Section 441d) b. Inspection Request c. "Letter of Change" notification	The documents/templates referred here are stored on the J:\ drive a. Initial request for information letter(441d) - The system should generate a pre-populated editable draft of the 441d letter, upon assignment of the appeal to be reviewed and approved by the Appraiser/Principal Appraiser	Must Have	This is a range of functionality that can currently be perform in proposed solution

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.8.1.10	The System shall provide authorized users with the capability to view, edit, and manage any appeals information in an appeals case management workflow including, but not limited to: a. Calendars b. Documentation c. Findings d. Status e. Correspondence sent via the System f. External correspondence	Calendar, Findings, Status come from County Assessment Appeal Board System. External Correspondence include e-mail correspondence and the attachments	Must Have	This range of functions would be enabled via the proposed solution's Workflow processing sub-system. Some customization of the current design may be require depending on the county's final specifications and findings after review with the County users. Additionally, this range of functions is enabled via the proposed system's Workflow processing sub-system. However, again some customization may be required depending on the county's final specifications for this function, which we expect to be determined in the 'Definition Phase" of this project. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	1.8.1.11	The System shall have the capability for authorized user to create and maintain appeal correspondence log, at any point of time		Must Have	This would be tracked in the event view and data table
4	1.8.1.12	The System shall have the capability for the authorized user to input into the system about the issuance of any time-sensitive request pertaining to an appeal	Example of time sensitive request : 1. R&T Section 1606 Request 2. R&T Section 408 Request 3. 2 Year Deadline	Must Have	The BOARD members (Read Only) and the owners or agents will be allowed access to the web portal where the latest information from the APAS will be available to disseminate as timely as possible.Furthermore, if physical notice is required the appropriate workflow will be tickled to initiate processing of that notice to the stakeholders.
4	1.8.1.13	The System shall alert assigned authorized user about any time-sensitive request pertaining to an appeal		Must Have	See section 1.2 of Template G where calendaring and scheduling technology is discussed.
4	1.8.1.14	The System shall have the capability to notify additional Assessor Staff and/or County Counsel, based on preconfigured business rules, informing them to review the appeal and coordinate with assigned Appraiser/Auditor.	E.g.. of Business Rule: The list of personnel to be notified. i.e. Based on these rules in the application, other personnel (e.g. CIO, Business Personal Property, County Counsel, etc.) may need to review the appeal.	Must Have	Please see response to 1.8.1.13
4	1.8.1.15	The System shall have the capability to send follow-up notifications to the authorized user if no response has been received from the Assessee/taxpayer by a predefined timeframe.	A second notice will be sent for the following notices, including, but not limited to: a. Initial Request for Information Letter and/or inspection letter; and/or b. Stipulation Form.	Must Have	Please see response to 1.8.1.13
4	1.8.1.16	The System shall have the capability for the authorized user to input the status of the appeal, at any stage of the appeal		Must Have	The system will have the capability of allowing authorized users to override the system generated value where necessary and in accordance with California Law.
3	**1.8.2**	**Receipt of Official Notification of Appeals Schedule**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	1.8.2.1	The System shall have the capability to notify County Counsel based on the pre-defined schedule, if appeals issues are identified by an authorized user including, but not limited to: a. If there are any legal issues b. If the assessee/taxpayer is represented by counsel c. If the property is above a preconfigured threshold level d. If they are appealing a CIO e. If there is any written findings requested		Should Have	Counsel could be provided read only access to the system to review this information
4	1.8.2.2	The System shall alert the assigned authorized user based on the pre-defined schedule to check whether a follow-up notification to applicant is required or not		Must Have	This would be part of the proposed appeals management functionality within the system.
3	**1.8.3**	**Hearing Preparations & Discussions**			
4	1.8.3.1	The System shall have the capability for an authorized user to notify Supervisor and obtain approval about a proposed Stipulation		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	1.8.3.2	The System shall provide the capability for authorized users to generate a prepopulated appeal package(for stipulation or formal hearing)documents including, but not limited to: a. Stipulation agreement b. Background and supporting documentation	The system should always provide the capability to edit and customize all the pre-populated documents/packages of documents	Must Have	This range of functions would be performed via the proposed solution's Appeals system design.
4	1.8.3.3	The System shall have the capability to send the appeal package content to various individuals for review and approval	All the packages need to be sent to the Supervisor for Review and Approval, before it is sent to any other individual. The stipulation packet will be sent to the following individuals: a. Assessee/Tax Payer (only receives the stipulation form); b. County Counsel; and c. Clerk of the AAB	Must Have	the appeals screen and the workflow manager would work together to address this request.
4	1.8.3.4	The System shall alert assigned authorized user about any pending time-sensitive request pertaining to an appeal	Example of time-sensitive request here is Stipulation agreement	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System. Again this would be part of the appeals view within the proposed system and the web portal application the citizen would be utilizing to make their appeal and process through it.
1	**2**	**ASSESSOR GENERAL REQUIREMENTS**			
2	**2.1**	**General Requirements**			
3	**2.1.1**	**Scheduling / Calendars**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.1.1	The System shall provide the capability to store tasks, schedules and key dates including but not limited to:	The system should facilitate the authorized users to input tasks, corresponding dates and dependencies which the system can use to trigger actions. For e.g.: Roll Close schedule, BOE Reporting	Must Have	Summary: There are a variety of mechanisms that enable scheduling and calendaring capabilities within Salesforce. Our customers often-times want a combination of features that enable them to sync their calendars with their office provider (Outlook, Office 365, Google) while enabling citizens to schedule appointment, and finally enabling internal employees to schedule activities around these requests and receive alerts/reminders when it is time to take action or dispatch an employee into the field to address a request or issue. Our proposed solution handles all of these use cases and many more through the use of 3 primary mechanisms: 1) Field Service Lightning - Provides citizen scheduling, internal dispatch capabilities, intelligent field service routing and route optimization, 2) Lightning Connect - Provides integration with Microsoft Office 365 calendars, Exchange Server, or Google Calendars to ensure Salesforce users have as much visibility they need into employees calendars within the security guidelines required, and 3) Salesforce Tasks and Reminders which are internal reminders to alert people of an upcoming activity they are assigned to.
4		a. Setting recurring dates			See Response to 2.1.1.1
4		b. Overriding recurring dates			See Response to 2.1.1.1
4		c. Manually setting dates			See Response to 2.1.1.1
4	2.1.1.2	The System shall notify authorized users of upcoming County deadlines as scheduled in the System		Must Have	See Response to 2.1.1.1
4	2.1.1.3	The System shall provide the capability to set optional reminder intervals for multiple or individual deadlines		Must Have	Lightning Connect will enable all San Mateo employees to have their Outlook Calendar events sync into Salesforce. Private events are not synced and visibility settings in Outlook are honored for data synced into Salesforce. This ensures that meetings scheduled in Outlook are able to be factored for when assigning tasks/activities to employees and when assigning inspections to field service reps. Smart Scheduling as well as employees designated as inspection dispatchers will be able to view and factor for all of an employee's scheduled activities when routing new work orders to them for action.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.1.4	The System shall provide the option to send manual/automatic reminders, according to system settings/user choices	For example, when we request for information/correspondence, after the preconfigured waiting period/deadline of notices, the system should remind authorized users to follow-up and take the necessary action	Must Have	Events and tasks are the engine of sales productivity. With Salesforce, you can be prepared for any meeting or inspection and know which task is your highest priority right now. Track meetings and tasks together in lists and reports to keep your finger on the pulse of all your citizens, work orders, and account activities. Events and tasks also serve historical reporting purposes in Salesforce. Whether you're a manager delegating tasks, part of a customer service team, or a field service/inspection rep who is handling dozens of inspections a month, activities in Salesforce help you organize your day.
4	2.1.1.5	The System shall provide the capability to configure blackout dates for scheduling different actions	The system shall provide the user with the flexibility to blackout dates when deadlines fall on weekends/holidays	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.1.6	The System shall provide the capability to display and print the summary of all work status and/or selected upcoming deadlines		Must Have	This could be a user defined report executed on demand or set up as report to run nightly on an autojob and be available the next day when the user logs in.
4	2.1.1.7	The System shall provide the capability for authorized users to drill down into summary work statuses to see the details		Should Have	This would be functionaly provided in the proposed solution's Workflow Subsystem.
4	2.1.1.8	The System shall provide the capability to export schedule to external calendar systems (i.e. outlook) as selected by the user		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the "Definition Phase" of the Project in order to meet or exceed client expectations. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.1.9	The System shall have the capability to maintain users' calendars in terms of vacations, out-of-office, etc. and will use this information when assigning workflow items	This functionality should be similar to the black-out dates configuration	Could Have	This requirement can be supported in the proposed solution design. However, the design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations.
4	2.1.1.10	The System shall have the capability to generate and send notifications to authorized users based on pre-configured schedule	E.g.: Notifications to authorized users to check about the availability of BOE provided information/data/report Information like Annual Inflation Factor, The Disabled Veteran's Income Levels, Low Income housing Levels, TPZ acreage info, Restricted Property Interest Rates	Could Have	This requirement can be supported in the proposed solution design. However, the design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.1.11	The System shall have the capability to schedule timed-release activities	E.g.: Effective date, Expiration Date which can be used in TRA updates for unsecured property, Parcel Management, CIO Sales, Construction etc.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**2.1.2**	**Correspondence Templates**			
4	2.1.2.1	The System shall retrieve contact information that can be used to generate and/or send physical mail and email correspondence		Must Have	This is part of the base proposed solution
4	2.1.2.2	The System shall provide the capability to create email/hard copy communication templates and message components		Must Have	This is part of the base proposed solution
4	2.1.2.3	The System shall have the capability to directly send emails to single or multiple email addresses or to distribution lists as individually or mass selected by an authorized user		Must Have	the proposed system should have this function based off of user and name data tables that will house their email addresses and perhaps cell phone carrier and cell numbers making texting a possiblity as well if allowed by SMCARE.
4	2.1.2.4	The System shall notify a designated account user or users if emails sent by the System were undeliverable		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.5	The System shall provide the capability to regenerate and resend email notifications to both existing and new email addresses		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.6	The System shall automatically populate templates with pre-configured data when the templates are selected to be sent by either manual or scheduled processes		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.7	The System shall provide the capability to save and apply electronic signatures/images to selected templates based on pre-configured business rules and as approved by authorized users		Should Have	This requested feature will be delivered as a constituent working function of the final delivered System., but there may be additional cost for third party proprietary software to capture electronic signatures with a secure method.
4	2.1.2.8	The System shall provide the capability to save multiple letterhead templates for use with physical mail and email correspondence templates as pre-configured by authorized users		Must Have	The authorized users will have the ability to create, modify, and delete the templates.
4	2.1.2.9	The System shall provide the capability to update letterhead templates and automatically apply the update to all associated correspondence templates		Must Have	This request will have to be discussed in further detail in order to ascertain whether the requirement can be met.
4	2.1.2.10	The System shall automatically retain a correspondence history of all communications initiated through the System including physical mail and emails as related to System events, updates, and APN		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System. An index key will be part of the event history data table.
4	2.1.2.11	The System shall have the capability to determine whether to generate electronic correspondence or hard copy correspondence based on available contact information, the public user specified preference, and the preconfigured business rules		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.12	The System shall have the capability for the authorized user to review the correspondence before sending and select the mode of transmission (electronically or hard copy) based on the public user specified preference, if available		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.2.13	The System shall provide the capability for authorized users to select the correspondence template to send for any relevant activity, including overriding any default recommended templates		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.14	The System shall provide the capability for the authorized user to edit pre-defined templates and message components before sending		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.15	The System shall have the capability to generate and apply barcodes to any System-generated correspondence and forms		Must Have	This can be accomplished. The dev team will have to know the exact font and location on the template the bar code needs to be. Note: there may be a cost for the county to purchase this font for all users workstations. Also, if the users are working remotely or off of their personal computers or mobile devices there is a high probability that the bar code functions will not work as designed.
4	2.1.2.16	The System shall have the capability to associate barcodes generated by the System, with accounts/parcel records in the System when the documentation is scanned or uploaded into the System		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.17	The System shall have the capability for the authorized user to disassociate barcodes from accounts/parcel records and re-associate to a different accounts/parcel records.		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.2.18	The System shall be able to provide the capability to print addressed envelopes or labels, or export mailing information in a format that is easily transferred to label or envelope templates in Microsoft Word		Must Have	Authorized users would be allowed to create a template for the various sizes of envelopes and labels. These templates would then be prepopulated with the relevant information from the records selected and printed from the users workstation.
4	2.1.2.19	The System shall have the capability to monitor receiving of assessee/Tax-payer response to different notices	E.g.: Escape-10 day notices	Must Have	The development team would need more information regarding this request before the capability can be confirmed as part of the new system.
4	2.1.2.20	The System shall have the capability for the authorized user to generate and send to Tax Collector's Office, the tax letter related correspondence by the requested APNs. The correspondence letter/report shall include but not limited to the following:		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Name of Subdivision			Please see response to 2.1.2.20
4		b. Situs Address			Please see response to 2.1.2.20
4		c. Title Company Name			Please see response to 2.1.2.20
4		d. Assessor's Parcel Number			Please see response to 2.1.2.20
4		e. Requested Date, Requestor's Name, Phone Number			Please see response to 2.1.2.20
4		f. Tax Rate Area			Please see response to 2.1.2.20
4		g. Fiscal Year			Please see response to 2.1.2.20
4		h. Supplemental Date of Value, if Required			Please see response to 2.1.2.20
4		i. Estimated Supplemental Roll Assessed Value, if Required			Please see response to 2.1.2.20
4		j. Regular Roll Assessed Value			Please see response to 2.1.2.20
4		k. Processed Date, Staff Name, and File Number			Please see response to 2.1.2.20

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.2.21	The System shall provide the capability for the authorized user to send the Excel form of the Tax segregation report and all the required supporting documents(e.g.: child parcel deeds) to Tax Collector's Office		Should Have	the system can output the form to a cvs file that can be attached to an email that the user sends to the correct address at the tax collector's office. The report could also be uploaded nightly, weekly, or monthly to a shared drive or FTP site.
4	2.1.2.22	The System shall allow authorized users to create/modify any number of correspondence groups	Example for correspondence groups is group based on property type, type of activity etc.	Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**2.1.3**	**Web Portal**			
4	2.1.3.1	The system shall provide the capability for public users and authenticated public users to access identified pieces of information through the Web portal	Examples of Information : 1. Parcel Information 2. Unsecured Account Information	Must Have	This comprehensive request will be provided via a standard public web site for public information. The web portal will be leveraged for the authenticated user portal that will provide them with specific forms, actions, and event notices that relate specifically to their property.
4	2.1.3.2	The System shall support a public-facing Web Portal including, but not limited to:		Must Have	Please see response in 2.1.3.1
4		a. Providing the ability for the County to create and distribute log-ins	Public could call the county to request to create a login to the Web portal		Please see response in 2.1.3.1
4		b. Providing the ability for public users to create log-ins			Please see response in 2.1.3.1
4		c. Providing the ability for public users to opt- in or opt-out of different public notifications as approved by County staff			Please see response in 2.1.3.1
4		d. Ensuring secure storage and transmission of data for County internal users and public users			Please see response in 2.1.3.1
4		e. Providing the ability for authenticated public users to upload/download documents including, but not limited to:			Please see response in 2.1.3.1
4		1. Excel files			Please see response in 2.1.3.1
4		2. CSV files			Please see response in 2.1.3.1
4		3. PDF documents			Please see response in 2.1.3.1
4		4. Word documents			Please see response in 2.1.3.1
4		5. HTML File			Please see response in 2.1.3.1
4		6. Gifs			Please see response in 2.1.3.1
4		7. JPEGs			Please see response in 2.1.3.1
4		8. TIFs			Please see response in 2.1.3.1
4		9. Data files			Please see response in 2.1.3.1
4		10. TXT Files			Please see response in 2.1.3.1
4		f. Providing the ability for authenticated public users to enter and/or select data in appropriate data fields as pre-configured in the system			Please see response in 2.1.3.1
4		g. Providing the ability for authenticated (public)users to select preferred communication methods and associated contact information			Please see response in 2.1.3.1
4		h. Pre-populating and/or displaying past or other known information to the authenticated public user as preconfigured for the selected request			Please see response in 2.1.3.1
4		i. Providing the ability to save work in-progress	The system should auto save the content		Please see response in 2.1.3.1
4		j. Providing the ability to submit completed information to the County			Please see response in 2.1.3.1
4		k. Based on the input from the authenticated public user, the system should validate and provide initial submission status notices based on preconfigured criteria including, but not limited to:			Please see response in 2.1.3.1
4		1. Request Submitted (along with any additional preconfigured information)			Please see response in 2.1.3.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		2. Requirement not met (along with reasons that help the requestor to take corrective actions, if available)			Please see response in 2.1.3.1
4		3. Request Incomplete (along with unmet criteria)			Please see response in 2.1.3.1
4		l. Having the capability to track the status of submitted requests - for authenticated public users as preconfigured			Please see response in 2.1.3.1
4		m. Providing the ability for authenticated public users to request for modification of previous submissions		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the "Definition Phase" of the Project in order to meet or exceed client expectations.
4		n. Providing the ability for authorized county staff to grant the privilege to authenticated public users to modify their previous submissions		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the "Definition Phase" of the Project in order to meet or exceed client expectations.
4		o. Providing the ability for public users to submit questions to the County without needing a login			Please see response in 2.1.3.1
4	2.1.3.3	The System shall perform an initial validation check against email addresses or other key data elements and notify the public user if an account already exists	Other Data Elements may include but not limited to: 1. DOB 2. Last 4 digits of the SSN 3. Zip Code 4. First Name, Last Name	Must Have	Please see response in 2.1.3.1
4	2.1.3.4	The system shall have the capability to do special authorization for Agents before giving electronic access.		Must Have	Please see response in 2.1.3.1
4	2.1.3.5	The System shall provide the ability for authenticated public users to reset passwords, retrieve usernames, and other standard web password actions		Must Have	Please see response in 2.1.3.1
4	2.1.3.6	The System shall review information submitted through the Web Portal for missing or invalid data components and prompt the authenticated public user to correct or enter the necessary components prior to accepting data into the System		Must Have	Please see response in 2.1.3.1
4	2.1.3.7	The System shall provide authorized users with the ability to review, accept, deny, hold, and edit data submitted to the system through the Web Portal		Must Have	Please see response in 2.1.3.1
4	2.1.3.8	The System shall have the capability to monitor for submission of specified data elements or data sets through the Web Portal		Must Have	Please see response in 2.1.3.1
4	2.1.3.9	The System shall have the capability to notify authorized users and/or generate workflow items based on data elements or data sets submitted through the Web Portal		Must Have	Please see response in 2.1.3.1
4	2.1.3.10	The System shall provide e-mail acknowledgment and/or Web Portal submission status updates as configured for successfully submitted items		Must Have	Please see response in 2.1.3.1
4	2.1.3.11	When a public user requests a log-in, the Web Portal shall require key data to be submitted along with the request including, but not limited to:		Must Have	Please see response in 2.1.3.1
4		a. Name			Please see response in 2.1.3.1
4		b. Position	Officer of the corporation/company, authorized agent, member of the bar(attorney) , Property/Business owner		Please see response in 2.1.3.1
4		c. Entity			Please see response in 2.1.3.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		d. Contact information			Please see response in 2.1.3.1
4		e. Intended Web Portal usage (i.e. upload data, review data, receive notifications, etc.)			Please see response in 2.1.3.1
4		f. Email address			Please see response in 2.1.3.1
4	2.1.3.12	The System shall provide the capability for authorized users to set different permission levels for different user accounts and user account types		Must Have	Please see response in 2.1.3.1
4	2.1.3.13	The System shall support a public-facing Web Portal, providing the ability for authenticated public users to submit requests/forms including, but not limited to:	Note:-> This requirement is based on the assumption that the Electronic Signature is acceptable to BOE during electronic submission of Exemption requests and similar Customer requests. The design of the Web portal should be flexible enough to accommodate the easy deletion and addition of new forms/applications based on the latest BOE rules on acceptance of Electronic Signature on various application forms, at any given point of time.	Should Have	This requested feature could be considered for development as a constituent working function of the final delivered System. Current technology does exist that would support this function. However, this would need to be based on the prospective mutually agreed final agreement.
4		1. Parcel/Account inquiry or change	Account in this context means the Business Personal Property Account.		Please see the response in 2.1.3.13
4		2. Exclusion requests	e.g. : Prop 60/90/110/58/193 Applications		Please see the response in 2.1.3.13
4		3. Homeowners' Exemption			Please see the response in 2.1.3.13
4		4. Disabled Veterans' Exemption			Please see the response in 2.1.3.13
4		5. Institutional Exemptions			Please see the response in 2.1.3.13
4		6. Historical Aircraft Exemptions			Please see the response in 2.1.3.13
4		7. Decline in value request			Please see the response in 2.1.3.13
4		8. Calamity Request			Please see the response in 2.1.3.13
4		9. Business Property Statements			Please see the response in 2.1.3.13
4		10. Mobile Home related forms (433A)			Please see the response in 2.1.3.13
4		11. Informal Property Review	e.g.: for reassessments , Prop 8		Please see the response in 2.1.3.13
4		12. Questionnaires	e.g.: Sales Questionnaire		Please see the response in 2.1.3.13
4		13. Subdivision Assessment Data Request (Tax Request Form)			Please see the response in 2.1.3.13
4	2.1.3.14	The System shall have the capability to provide Web Portal log-ins to external agencies including, but not limited to:		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Cities and municipalities			Please see the response in 2.1.3.14
4		b. Airports			Please see the response in 2.1.3.14
4		c. School districts			Please see the response in 2.1.3.14
4		d. Water districts			Please see the response in 2.1.3.14
4		e. Special districts			Please see the response in 2.1.3.14
4		f. Planning department			Please see the response in 2.1.3.14
4		g. Emergency services			Please see the response in 2.1.3.14
4		h. Fire Districts			Please see the response in 2.1.3.14

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.3.15	The System shall provide Title Companies/property owners with the capability to submit tax letter requests via the Web Portal along with the details including, but not limited to:	Added to Web portal	Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations. Current technology and developmental experience does exist that would support this function. However, this would need to be based on the prospective mutually agreed final agreement.
4		a. Name of Subdivision			Please see the response in 2.1.3.15
4		b. Situs Address			Please see the response in 2.1.3.15
4		c. Title Company Name			Please see the response in 2.1.3.15
4		d. Assessor's Parcel Number			Please see the response in 2.1.3.15
4		f. Requested Date, Requestor's Name, Phone Number			Please see the response in 2.1.3.15
4		g. Copy of the Subdivision Map or Parcel Map			Please see the response in 2.1.3.15
4	2.1.3.16	The Web Portal shall have the capability for the Tax Collector's Office to submit the Tax segregation request		Should Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations. Current technology and developmental experience does exist that would support this function. However, this would need to be based on the prospective mutually agreed final agreement.
4	2.1.3.17	The System shall provide property owners with the capability to submit a parcel change request via the Web Portal including, but not limited to:	The system shall also provide the capability for the requestor to upload the required documentations such as planning department approval, legal description along with the request	Should Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations. Current technology and developmental experience does exist that would support this function.
4		a. Parcel split			Please see the response in 2.1.3.17
4		b. Parcel combine			Please see the response in 2.1.3.17
4	2.1.3.18	When a parcel change is requested by a property owner, the Web Portal shall have the capability to prompt the property owner to edit, enter, and otherwise complete required fields including, but not limited to:		Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.
4		a. Parcel number(s)			Please see the response in 2.1.3.18
4		b. Owner's name and Phone Number			Please see the response in 2.1.3.18
4		c. Submission date			Please see the response in 2.1.3.18
4		d. Lot Number and Block Number (only for subdivide)			Please see the response in 2.1.3.18
4		e. A brief description for each proposed parcel (only for subdivide)			Please see the response in 2.1.3.18

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.3.19	The Web Portal shall have the capability to prompt the property owner to provide additional required supporting documents from Planning Department		Must Have	The discover and dev team of Sapient will need to understand what triggers the planning department envolvement, and what their documentations requirements are before confirming or denying this capability.
4	2.1.3.20	When a authenticated public user is trying to submit the Exclusion request via Web Portal, the portal shall prompt the user to complete exclusion request information including, but not limited to: a. All effected APN(s) and Counties b. Owner name c. Owner address d. Change in Ownership information (based on necessary PCOR data) e. Any required documents based on the type of exclusion selected f. Exclusion type	System shall notify property owners who have provided email address that an exclusion may be available to prevent reassessment. Otherwise, exclusion letters will be mailed. Either way, one of the options to complete the questionnaire will be through the web portal.	Should Have	In order to comply with this range of requested data, the proposed system's web portal would require the addition of another electronic form that would in effect, trap the data elements identified in this request so that this new data could be used to update the main database.
4	2.1.3.21	When a property owner requests a Homeowner's Exemption, the Web Portal shall have the capability to prepopulate known information and prompt the property owner to complete remaining required information including, but not limited to:	The key field that the system can use to pre-populate the information is the APN	Must Have	This will require some first-hand analysis of the current proposed Web portal design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Social security number (if applicable)			Please see the response in 2.1.3.21
4		b. Tax ID number (if SSN is not available)			Please see the response in 2.1.3.21
4		c. Phone number			Please see the response in 2.1.3.21
4		d. Email address			Please see the response in 2.1.3.21
4		e. Acquire date			Please see the response in 2.1.3.21
4		f. Occupy date			Please see the response in 2.1.3.21
4		g. Other CA property ownership County(s) and Parcel Number(s)			Please see the response in 2.1.3.21
4		h. Other intracounty property ownership			Please see the response in 2.1.3.21
4		i. Account or vessel number			Please see the response in 2.1.3.21
4		j. E-signature			Please see the response in 2.1.3.21
4	2.1.3.22	The Web Portal shall have the capability to compare property owner-entered information against system records and prompt the user to verify and confirm any identified differences	For e.g.: If the home owner has a home owner's exemption on another property within the county then the system should display that information Only certain information should be editable. For e.g.: Phone Number & E-mail Address	Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.
4	2.1.3.23	When a disabled veteran requests a disabled veterans' exemption, the Web Portal shall have the capability to prepopulate known information and prompt the property owner to complete remaining required information including, but not limited to:	The key field for the system to identify the information is the APN The system shall provide the capability to the user to print the completed form	Must Have	This will require some first-hand analysis of the current proposed web portal design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. Name b. Social security number (if applicable) c. Tax ID number (if SSN is not available) d. Phone number e. Email address f. Acquire date g. Occupy date h. Other CA property ownership County(s) and Parcel Number(s) i. Other intracounty property ownership j. Account or vessel number k. E-signature l. Effective Date of disability / unemployment m. Date on the VA Letter n. Application Filing/received Date			See the response above
4	2.1.3.24	The Web Portal shall have the capability to review disabled veteran-provided information to determine additional required supporting documents	Based on the information that is provided by the requestor, the system should display a list of documents required.	Must Have	This will require some first-hand analysis of the current proposed web portal design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.3.25	When an owner requests a historic aircraft exemption, the Web Portal shall have the capability to prepopulate known information and prompt the owner to complete remaining required information including, but not limited to:	The key field using which the system should identify the aircraft and populate the known information is Unsecured Account# / FAA or Tail Number Note:- This requirement is based on the assumption that the Electronic Signature is acceptable to BOE during electronic submission of Exemption requests and similar Customer requests. The design of the Web portal should be flexible enough to accommodate the easy deletion and addition of new forms/applications based on the latest BOE rules on acceptance of Electronic Signature on various application forms, at any given point of time.	Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.
4		a. Display dates b. Place of display c. Verifying signature d. Aircraft for sale (Y/N) e. For Commercial Use(Y/N) f. Used for general Transportation(Y/N)	If the Aircraft is for sale then it does not qualify for this exemption		Please see the response above
4	2.1.3.26	When an owner requests an Aerospace Museum aircraft exemption, the Web Portal shall have the capability to prepopulate known information and prompt the owner to complete remaining required information including, but not limited to:	The key field using which the system should identify the aircraft and populate the known information is Unsecured Account# / FAA or Tail Number Note:-> There are no Museum Aircrafts within the San Mateo County currently but we need this functionality in the System for future benefit	Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		a. Location of the Aircraft as of 12:01 A.M. January 1 b. Name and address of Museum in which the aircraft is on Display c. Museum Director's/Officer's Name d. Aircraft Description(Make, Model, Year, FAA or Tail# , if not already available in the system/pre-populated) e. Nature of the aircraft for which exemption is claimed. i.e. :- 1. Aircraft that has been restored or maintained, whether currently certified or not, for flight purposes 2. Aircraft donated in perpetuity to the aerospace museum f. Verifying signature	All the information requested on BOE-260-A form		Please see the response above
4	2.1.3.27	The Web Portal shall have the capability to review provided information to determine additional required supporting documents, if any.	As of now, there are no supporting documents required	Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.
4	2.1.3.28	The Web Portal shall prompt authorized public users with no existing account in the System, to provide aircraft reference information including, but not limited to:		Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.
4		a. Tail Number			Please see the response to 2.1.3.28
4		b. Original Sales Price			Please see the response to 2.1.3.28
4		c. Model			Please see the response to 2.1.3.28
4		d. Make			Please see the response to 2.1.3.28
4		e. All data elements listed on Aircraft Property Statement			Please see the response to 2.1.3.28
4		f. Final Sales Price			Please see the response to 2.1.3.28
4		g. Date/Year Aircraft was sold and sales price			Please see the response to 2.1.3.28
4	2.1.3.29	The Web Portal shall have the capability to conduct a pre-qualification check for all historic aircraft, exemption claims	The criteria to be checked for the historic aircrafts:- a. Shown 12 times in calendar year b. Older than 35 years c. Less than 5 existing (d). Not homebuilt/kit or experimental. e. Airworthy f. The owner of the aircraft should be an individual owner(a live person, not a legal entity such as a corporation or partnership) g. Not for commercial purposes or general transportation	Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.3.30	The Web Portal shall have the capability to conduct a pre-qualification check for all aerospace museum aircraft exemption claims	The criteria to be checked for the Museum aircrafts:- Nature of the aircraft for which exemption is claimed. i.e. :- 1. Aircraft that has been restored or maintained, whether currently certified or not, for flight purposes 2. Aircraft donated in perpetuity to the aerospace museum	Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.3.31	The Web Portal shall have the capability to display a "does not qualify" message to the owner if the aircraft clearly does not qualify based on preconfigured business rules	Preconfigured business rules for Historical Aircraft:- a. Shown 12 times in calendar year b. Older than 35 years c. Less than 5 existing d. Not homebuilt/kit or experimental. e. Airworthy	Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.3.32	The Web Portal shall have the capability to display the details about the one time fee to the owner if the aircraft is being filed for exemption for the first time	For first time filing of aircrafts, the assessor department charges a fee. The web portal should show the details of the fee, if the aircraft is being filed for the exemption for the first time.	Should Have	The proposed Assessor solution does not provide for the below functions in a web portal medium. However, this proposing vendor can demonstrate its development skills in web portal development via its comprehensive interactive web portal solution, which is a proposed sub-system for the overall proposed system.
4	2.1.3.33	When an owner requests a commercial fishing exemption, the Web Portal shall have the capability to prepopulate known information like Owner Name, Mailing Address, Hailing port, harbor/port in San Mateo County and then prompt the owner to complete remaining required information	The key field using which the system should identify the vessel/owner and populate the known information is Coast Guard Document # or DMV CF#. The complete list of fields is available in BOE Form 576-E. As per Greg Electronic signature is acceptable to BOE in this case	Should Have	This range of functionality would have to added to the proposed Web Portal solution for this engagement. Therrefore, this requested feature could be considered for development as a constituent working function of the final delivered System. Current technology and developmental experience does exist that would support this function.
4	2.1.3.34	The Web Portal shall have the capability to review provided information to determine additional required supporting documents, if any	Supporting Documents include but not limited to : Certification of Inspection by Coast Guard, Ship's log, Classification by Homeland Security or Coast Guard, Affidavit of intent, for research vessels contract from qualifying agency or organization, etc.	Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations.
4	2.1.3.35	The Web Portal shall have the capability to conduct a pre-qualification check for commercial fishing exemption claims	Main checks that can be done are : 1. The deadline for submission of claims for qualification 2. Standard qualifications listed under Section 227 of the California Revenue & Taxation Code The system shall also display a message displayed to the requestor that the request will be further verified before the final approval is given .	Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.3.36	The Web Portal shall have the capability to display a "does not qualify" message to the owner if the vessel clearly does not qualify based on preconfigured business rules	Business rules for qualification for this Exemption:- a. Takes fish/living resources from the sea for commercial use b. In instruction or research studies as an oceanographic research vessel. c. In carrying or transporting seven or more people for hire for commercial passenger fishing purposes and holds a current certificate of inspection issued by the United States Coast Guard. d. Has a Coast guard document number f. Has a Fish and game # g. Has a Fish and game registration number	Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.3.37	When a property owner requests a new institutional exemption, the Web portal shall have the capability to prepopulate known information and prompt the property owner to complete remaining required information and attached documentation including, but not limited to:		Must Have	This will require some first-hand analysis of the current proposed web portal design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.
4		a. Organization name			Please see the response to 2.1.3.37
4		b. Affected property accounts			Please see the response to 2.1.3.37
4		c. Organizational Clearance Certificate (OCC) file			Please see the response to 2.1.3.37
4		d. Organizational Clearance Certificate number			Please see the response to 2.1.3.37
4		e. Corporation number			Please see the response to 2.1.3.37
4		f. Supplemental Clearance Certificate file (welfare only)			Please see the response to 2.1.3.37
4		g. Effective fiscal year of OCC Certificate (welfare only)			Please see the response to 2.1.3.37
4		h. Effective fiscal year Supplemental Clearance Certificate			Please see the response to 2.1.3.37
4	2.1.3.38	The Web Portal shall have the capability to conduct a pre-qualification check for all institutional exemption claims based on pre-defined Business Rules	Business Rules here are mainly for validation of mandatory field values	Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.3.39	The Web Portal shall provide the capability for users to fill out the calamity form and upload any other documentation including, but not limited to: a. Insurance documentation b. Contractor documentation c. Photos d. Summary statement of expenses with receipts	An applicant/home owner should be able to submit the calamity form and any additional documentation in multiple ways, i.e. web portal, fax etc. Insurance claims, cost estimates & some documents are often submitted at a separate time from the claim and the system should be able to connect the claim and the documentation submitted at a later point of time and notify the public user about the receipt of the application/additional documentation. - 'User' in this context is the home owner	Must Have	This will require some first-hand analysis of the current proposed web portal design. Nevertheless, this requested feature will be delivered as a constituent working function of the final delivered System.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.3.40	The Web portal should have a functionality for the external users/Harbor Masters to submit the information about boats during the Boat Discovery Process		Could Have	This requirement could be supported with current web development technical skill sets. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.3.41	The system shall serve as a self-service web portal for the (authenticated) public users	For the (authenticated) public users to access online application forms, to inquire about their property characteristics and assessment	Must Have	The proposed Assessor solution does not provide for the below functions in a web portal medium. However, this proposing vendor can demonstrate its development skills in web portal development via its comprehensive interactive web portal solution, which is an optional sub-system of the proposed system.
3	**2.1.4**	**Interfaces / External Data Files**			
4	2.1.4.1	The System shall have the capability to interface with the County and/or Assessor's Geographic Information System (GIS) including, but not limited to:		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4		a. Providing authorized users with the capability to retrieve selected information from the County and/or Assessor's GIS System on an ad-hoc basis			Please see the response to 2.1.4.1
4		b. Associating retrieved information from the County and/or Assessor's GIS System with the correct parcels in the System			Please see the response to 2.1.4.1
4		c. Exporting information to the County and/or Assessor's GIS System			Please see the response to 2.1.4.1
4		d. Importing information from the County and/or Assessor's GIS System	For e.g.: Importing the Parent and child parcel relationship when a parcel split/combine happens		Please see the response to 2.1.4.1
4	2.1.4.2	The System shall have the capability to interface with the County Recorder System, including, but not limited to:		Must Have	Information from the recorders office will be imported based on sets of business rules from customer and will create the activities needed to process the transactions
4		a. Automatically retrieving selected information from the Recorder's Office System on a user defined schedule			Please see the response to 2.1.4.2
4		b. Providing authorized users with the capability to retrieve selected information from the Recorder's Office System on an ad-hoc basis			Please see the response to 2.1.4.2
4		c. Retrieving and displaying information in the recorded documents	e.g.: date of recording, date of value, transfer tax amount, document type (deed, affidavit of death, lease, notice of default)		Please see the response to 2.1.4.2
4		d. Retrieving and displaying information in the internal documents	e.g.: Stamp values (transfer tax/PCOR - Preliminary Change in Ownership Report) if applicable based on date and transaction		The given details would be part of the Change in Ownership/Deed Record and would be includied in the user views.
4		e. Generating workflow items based on information in the Recorder's Office System			Please see the response to 2.1.4.2
4		f. Querying documents and data recorded in the Recorder's Office System			Please see the response to 2.1.4.2

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.4.3	The System shall have the capability to interface with other County Department systems including but not limited to: 1. Controller 2. Tax Collector 3. Building Department	The System shall have the capability to receive and send data/information from/to the other department systems, for example, Tax Collector's Department submitting handbill request to Assessor & Assessor sending back assessment details E.g.. of County building permit systems - Accela and CRW	Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.4	The System shall have the capability to transfer information/data files from/to the State Board of Equalization system	e.g.: 1. Forms 2. Statistical Data requests 3. Valuation Factors 4. LTAs 5. CAOs 6. Home Owner's exemption data 7. Disabled Veteran's exemption data 8. Multiple Claims List 9. LEOPs	Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.5	The System will interface with the County Assessment Appeals Board System - including, but not limited to:		Must Have	The AAB module is a constituent component of the proposed solution.
4		a. Receiving appeals data and documents			Please see the response to 2.1.4.5
4		b. Associating appeals data and documents with accounts and parcels in the System			Please see the response to 2.1.4.5
4		c. Generating filing and hearing dates and events from AAB provided information			Please see the response to 2.1.4.5
4		d. Uploading AAB updates into the System			Please see the response to 2.1.4.5
4		e. Tracking AAB denials and decisions			Please see the response to 2.1.4.5
4		f. Retrieving Stipulations signed by the Assessor and AAB			Please see the response to 2.1.4.5
4		g. Verifying the Assessor has correctly made the AAB Adjustment to CARE so refunds/adjustments can be processed			Please see the response to 2.1.4.5
4	2.1.4.6	The system shall have the capability to transfer/export data files to external systems including, but not limited to: a. Cities/County Planning Departments b. Public Works Department c. Print/Mailing Vendor(s) d. Parcel Quest		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.7	The System shall interface with the County's existing Enterprise Document Management Systems (e.g., IBM FileNet and SharePoint) for document management, document imaging and image capture, records management and web content management) System		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.8	The System shall provide the capability to integrate with MS Office products including, but not limited to:		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4		a. Importing data from Excel spreadsheets			Please see the response to 2.1.4.8
4		b. Exporting data from Excel spreadsheets			Please see the response to 2.1.4.8
4		c. Exporting calculations to Excel			Please see the response to 2.1.4.8

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.4.9	The System shall have the capability to interface with other County-determined agencies including, but not limited to:		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4		a. State Administrator Dept. of any subscribed SDR and eSDR services	The System shall have the capability to receive and save BIN numbers and all the information submitted on the 571-L form, from the State Administrator of any subscribed SDR and eSDR services		Please see the response above
4	2.1.4.10	The system shall have the capability to interface with valuation applications and accept data for individual as well as mass update		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.11	The System have the capability to capture information/data from various publically available data sources including but not limited to : 1. National Automobile Dealers Association(NADA) 2. BUC 3. Aircraft Bluebook Price Digest 4. FAA		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.12	The system shall have the capability of interfacing, importing/capturing data from different internal database which includes confidential and open data		Should Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.4.13	The system shall have the capability of importing/capturing data from different subscriptions including but not limited to : CoStar, MLS		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.4.14	The system shall have the capability of importing/capturing data from different sources including but not limited to : 1. IREM, KORPAZ 2. Department of Motor Vehicles 3. USPS 4. Cities' Building Departments(within the County) 5. Coast Guard 6. Marinas 7. Airports		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.4.15	The System shall have the capability to interface with Marshall & Swift system		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.4.16	The System shall have the capability to export/transfer data to the County Elections System	The system shall have the capability to send information to Elections System	Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period in order to meet or exceed client expectations.
3	**2.1.5**	**Workflow / Worklist**			
4	2.1.5.1	The system shall have the ability for authorized users to create new activity	The user should have the ability to initiate a new activity based on his/her role. An activity means any work item that the assessor staff needs to perform	Must Have	New activity in the proposed solution can be triggered or created by an authorized user.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.5.2	The System shall have the ability to create a new activity and notify authorized users when an authenticated public user submits a request via Web portal		Must Have	Web Portal activities can trigger notification to assigned users
4	2.1.5.3	The system shall have the capability for the authorized user to configure the order of activity	The System shall function as an activity/date-driven system	Must Have	Activities can be configured and prioritized by authoriized user
4	2.1.5.4	The system shall have the capability to create and sequence workflows based on the configured order of the activity	The System shall function as an activity/date-driven system	Must Have	Activities can be configured and sequnced by authoriized user
4	2.1.5.5	The System shall have the capability to trigger workflows based on activities as preconfigured in the System	The System shall also have the capability to trigger workflows based on data values. For e.g.: the Supervisor approval workflow needs to be triggered based on certain data values	Must Have	Activities can be configured and sequnced by authoriized user
4	2.1.5.6	The System shall provide the capability to set deadlines and alerts for specific work items		Must Have	Activites can be aged and appropriate action taken when they approach expiration
4	2.1.5.7	The System shall have the capability to assign work items to individual users or user groups based on the pre-defined business rules	Example of Business Rule: 1. Assignment of a property to a particular Appraise based on district & neighborhood, Use Code etc.	Must Have	Users can be assigned a range of activities
4	2.1.5.8	The System shall have the capability to maintain work queues for individual users and for groups of users		Must Have	Each individual user will have their own work queue and calendar
4	2.1.5.9	The System shall provide the capability for authorized users to select a work item from their work queue based on user defined logic as well as individual judgment	User Defined Logic can be based on : 1. Prioritization of different work items 2. Grouping of activity types 3. Event Dates 4. Value	Must Have	Users can select items to work on from their work queue
4	2.1.5.10	The System shall have the capability to route work based on, but not limited to:		Must Have	The will be addressed by the proposed system's workflow managment design and calendar integration based of the business rules provided by SMCARE
4		a. Assigned user			Please see the response to 2.1.5.10
4		b. User roles			Please see the response to 2.1.5.10
4		c. User rights			Please see the response to 2.1.5.10
4		d. Existing work status			Please see the response to 2.1.5.10
4		e. Existing work quantity			Please see the response to 2.1.5.10
4		f. Criteria	e.g. : Out of Office reassignment		Please see the response to 2.1.5.10
4	2.1.5.11	The System shall provide the capability to configure single or multiple approvers for any workflow item	For E.g.: 1.All supplemental should be approved by supervisor. All cancellations / corrections should be approved by supervisor 2. In case of high value properties if the value is greater than defined amount it may require a second level (Chief Appraiser/ Deputy Assessor) of approval 3. All exclusions and exceptions should be approved by supervisor for both Real Property and Business Personal Property	Must Have	Activities can be setup for different approval paths reaching out to multiple user roles, security levels, and positions.
4	2.1.5.12	The System shall provide the capability to track and show work item status		Must Have	Activities will have status code
4	2.1.5.13	The System shall provide the ability for authorized users to designate a portion of their workflow items to other users		Must Have	Reassignment of workflow items can be dodne by authorized users

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.5.14	The System shall provide the capability to annotate any work item including, but not limited to:	This functionality should be available when the user creates/route work items	Must Have	Notes can be attached to individual activities
4		a. Free text notes			Please see the response to 2.1.5.14
4		b. Hyperlinks			Please see the response to 2.1.5.14
4		c. Dates			Please see the response to 2.1.5.14
4		d. Special Characters	e.g.: Arrows, Definable tick-marks, Symbols		Please see the response to 2.1.5.14
4		e. Highlighting			Please see the response to 2.1.5.14
4		f. Attachments			Please see the response to 2.1.5.14
4	2.1.5.15	The System shall prompt users to complete required actions before workflow routing or continued processing including, but not limited to:		Must Have	Activities can be linked and be configued to be dependant on other activities
4		a. Uploading and/or entering specific data			Please see the response to 2.1.5.15
4		b. Verifying that key data is correct			Please see the response to 2.1.5.15
4	2.1.5.16	The System shall have the capability to notify pre-determined users about the progress of the workflow items, including both progressions initiated by user actions and those automatically conducted by the System		Must Have	Dashboards depicting the overall status of activities can be viewed by authorized users
4	2.1.5.17	The System shall have the capability to store pre-defined lists including, but not limited to:	This list can be used in the system for drop-down selection, lookup etc.	Must Have	Reason code tables
4		a. Reason codes and descriptions			Please see the response to 2.1.5.17
4		b. Comment categories			Please see the response to 2.1.5.17
4	2.1.5.18	The System shall check for dependencies on completed activities with a later date of value than the current event and notify the user about the completed event, before the current work item is being completed		Must Have	Activities can be linked and be configued to be dependant on other activities
4	2.1.5.19	The System shall check for dependencies on prior pending/outstanding activities and prompt the user about the dependent event, before the current work item is being completed	e.g. : 1. Prioritization of work items	Must Have	Activities can be linked and be configued to be dependant on other activities
4	2.1.5.20	The System shall have the capability for the authorized users to access workflow and workflow items, internally and externally	Externally means the authorized users accessing the system using web	Must Have	Items will be accessible over the web
4	2.1.5.21	The System shall provide the capability for authorized users to set deadlines for workflow items and send reminders as preconfigured in the System		Must Have	Activities can trigger notification to assigned users
4	2.1.5.22	The System shall provide the capability for authorized users to override preconfigured workflow routing	Authorized user in this context is the Supervisor. The Supervisor should be able to: 1. Re-assign the workflow items to a different user 2. Re-route the workflow in a different order other than that is configured in the system	Must Have	Activities can be configured and prioritized by authoriized user
4	2.1.5.23	The system shall have the capability for the user to input the values from the valuation process		Must Have	Valuation values can br inputted into the value correlation screen and then used for assessments
4	2.1.5.24	The System shall provide the capability for authorized users to perform mass approvals of review or work items in their work queue		Must Have	Sapient will need more information before we could confirm or deny this capability. THis has been attempted in the past without success due to scope and the lack of clear requirements.
4	2.1.5.25	The System shall provide authorized users to view workflow history	The System shall have the ability to show the details of the steps of the workflow along with the user(who acted on it) and the timeline	Must Have	Activities will have status code
4	2.1.5.26	The System shall enable authorized users to specify estimated completion duration for workflow items		Must Have	Activited have a date due column to allow for estimated completion dates to be applied

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.5.27	The System shall have the capability to automatically track the time spent on each activity by individual user		Could Have	This requirement could be supported. The design and development team would like to garner more details related to this requirment in the negotiation or discovery period (i.e., Definition Phase) in order to meet or exceed client expectations.
4	2.1.5.28	The System shall have the capability to hold the enrolled values, for a predetermined length of time in the authorized user queue or until released to the roll by an authorized user	This requirement is for the two person integrity check Authorized User here means the Supervisor or a user designated by the Supervisor	Must Have	Activites can be aged and appropriate action taken when they approach expiration
4	2.1.5.29	The System shall have the capability to route activities along with supporting documents to relevant authorized user based on the type of activity	e.g. : When the recorded document is a lease, the System shall create an activity for the CIO Supervisor to review the recorded document and process it	Must Have	Activities can be linked to the appropriate document
4	2.1.5.30	The System shall have the capability to initiate the workflow work item for the Parcel Management team to start the work on ғ Tax segregation upon the receipt of the request from Tax Collector's office electronically		Must Have	Activities can be linked and be configued to be dependant on other activities
3	**2.1.6**	**Data**			
4	2.1.6.1	The System shall store data as needed		Must Have	The data model is completely configurable in order to store data as needed.
4	2.1.6.2	The System shall provide the capability to display or pre-populate prior year and/or other relevant information when available (i.e., during calculation or review) for specific data fields and forms		Must Have	The application will be configured to provide this capability.
4	2.1.6.3	The System shall have the capability to search and review data elements associated with an individual or group of parcels/accounts and identify parcels/accounts that meet the selected or pre-defined criteria		Must Have	Salesforce's Global Search capability allows you to search all fields in order to easily find records that meet the selected criteria.
4	2.1.6.4	The System shall provide the capability to manually add free text notes and commentary to any work screen	The notes should not be overwritten at all and time stamped	Must Have	Notes can be added to any system record and they are all time stamped.
4	2.1.6.5	The System shall provide the capability for authorized users to document manual actions and activities into a parcel/account's action history including, but not limited to:	The notes should not be overwritten at all and time stamped	Must Have	Manual actions can all be logged/documented in the system.
4		a. Discussions with County staff			See response to 2.1.6.5
4		b. Discussions with external agencies			See response to 2.1.6.5
4		c. Research actions conducted external to the System			See response to 2.1.6.5
4		d. Correspondence and attempted correspondence actions conducted external to the System			See response to 2.1.6.5
4					
4	2.1.6.6	The System shall provide the capability for authorized users to enter, upload, or populate data into the system from files in multiple formats including, but not limited to:		Must Have	Authorized users can populate data from multiple file types and/or attach documents to associated records in the system.
4		a. Excel spreadsheets			See response to 2.1.6.6
4		b. PDF documents			See response to 2.1.6.6
4		c. Import check images from various sources			See response to 2.1.6.6
4		d. HTML File/XML file			See response to 2.1.6.6
4		e. Gifs			See response to 2.1.6.6
4		f. JPEGs			See response to 2.1.6.6
4		g. TIFs			See response to 2.1.6.6

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4		h. Word Documents			See response to 2.1.6.6
4		i. Data files			See response to 2.1.6.6
4		j. TXT Files			See response to 2.1.6.6
4		k. Database files			See response to 2.1.6.6
4		l. CSV Files			See response to 2.1.6.6
4	2.1.6.7	The System shall provide the capability for authorized users to search data elements and return parcels/accounts that meet the search criteria. Search capabilities shall include, but not be limited to:		Must Have	Salesforce's Global Search capability allows you to search all fields in order to easily find records that meet the selected criteria.
4		a. Fuzzy search			Fuzzy search is available through an AppExchange add-on to Salesforce.
4		b. Probabilistic match			Further clarification is required.
4		c. Wildcard			This is a native capability of Salesforce.com
4		d. Date or Date Range Search			This is available through search criteria or reports.
4		e. Processed by Search			Further clarification is required.
4		f. Specific Dollar Amount or Dollar Amount Range			This is available through search criteria or reports.
4		g. Maximum Search			This is available through search criteria or reports.
4		h. Minimum Search			This is available through search criteria or reports.
4		i. Roll Type			Further clarification is required.
4		j. Elastic search			Further clarification is required.
4		k. Positive or Negative Value			This is available through search criteria or reports.
4	2.1.6.8	They System shall provide the capability for authorized users to query current year, prior year, and other relevant information	e.g.: Owner name, mailing address, values, situs, parcel/account #, communication history, characteristics etc.	Must Have	This is a native capability of Salesforce.com
4	2.1.6.9	The System shall provide one or more confirmation statuses for data that has been entered but not finalized and approved	e.g.: If public uploads data into the system, the system shall automatically send a confirmation status	Must Have	Data that is uploaded can have a status that indicates it is not finalized and approved.
4	2.1.6.10	The System shall provide the ability for authorized users to manually refresh displayed data and/or calculations, including after completing manual adjustments		Must Have	This is a native capability of Salesforce.com
4	2.1.6.11	The System shall track manual changes or overrides made by authorized users, and provide reports to supervisors/management		Must Have	Fields can be enabled with audit log tracking.
4	2.1.6.12	The System shall provide a holding area for data/values that have not been saved in the System by the authorized user or users	e.g.: Work in progress data, workflow data	Must Have	Data can be saved in a record with a status of Draft or something to that effect.
4	2.1.6.13	The System shall store or access the information from other data sources as needed including, but not limited to:		Must Have	Data can store or access information from other systems via integration.
4		a. Background information about Revenue and Taxation code			See response to 2.1.6.6
4		b. County policy and interpretation of Revenue and Taxation code			See response to 2.1.6.6
4		c. Relevant government codes and interpretations			See response to 2.1.6.6
4		d. Internal office procedures			See response to 2.1.6.6
4	2.1.6.14	The System shall have a general reference library that can be referenced by authorized users and should have the capabilities including, but not limited to:		Must Have	Salesforce has a native knowledgebase. Additional licenses may be needed for knowlege base article publishers.
4		a. Being searchable			The knowledgebase is fully searchable
4		b. Being indexed			The knowledgebase is indexed
4		c. Being downloadable/printable			Knowledgebase pages can be downloaded or printed.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.6.15	The System shall have the capability to upload/update/archive documents to the general reference library that can be referenced by authorized users		Must Have	Files can be uploaded and stored in a central library/folder.
4	2.1.6.16	The System shall provide access to background, policy, and relevant reference information directly related to the screen or field level of work being conducted		Must Have	The help system can be customized.
4	2.1.6.17	The System shall display stored reference information via mouse-over pop-up		Must Have	Fields have a mouse-over help icon.
4	2.1.6.18	The System shall provide the capability for authorized users to configure error messages		Must Have	Error messages can be customized.
4	2.1.6.19	The System shall have the capability to track account/program enrollment as defined in the System	e.g. of Program: Exemptions(Institutional, Veterans, Home owner's), Calamity, Williamson Act, Decline in Value etc.	Must Have	Enrollment can be configured.
4	2.1.6.20	The System shall provide the ability for authorized users to directly enter any information that public users are able to enter via the Web Portal		Must Have	This is a native capability of Salesforce.com
4	2.1.6.21	The System shall provide authorized users with the ability to search parcels/accounts by status including, but not limited to:		Must Have	This is a native capability of Salesforce.com
4		a. Active			This is a native capability of Salesforce.com
4		b. Inactive			This is a native capability of Salesforce.com
4		c. Interim			This is a native capability of Salesforce.com
4		d. Retired			This is a native capability of Salesforce.com
4	2.1.6.22	The System shall provide authorized users with the ability to configure business rules, thresholds, calculation, data validation rules, Data integrity rules, etc. as needed in the System		Must Have	Business rules, workflows, data validation, etc. can all be configured.
4	2.1.6.23	The System shall maintain a history of configurable items including associated effective start and end dates		Must Have	Business rules, workflows, data validation, etc. can all be activated or de-activated.
4	2.1.6.24	The System shall maintain an audit trail for all configuration items		Must Have	Salesforce has native audit log tracking.
4	2.1.6.25	The System shall have the capability to perform data validation and data integrity checks at the field, record, and DB level according to defined business rules and shall alert the authorized user if any validation or integrity check has not been met		Must Have	Business rules, workflows, data validation, etc. can all be configured.
4	2.1.6.26	The System shall have the capability to maintain and auto assign the major/headquarter account number from a database of available numbers as defined by authorized users		Must Have	Numbers such as account number can be configured so that they are auto-assigned.
4	2.1.6.27	The System shall have the capability to auto fill all ownership, Doing Business As(DBA), and mailing address information for a new location under an existing major/headquarter account		Must Have	This can be configured in the system.
4	2.1.6.28	The System shall have the capability to maintain separate data records for multiple rolls including multiple current and closed rolls		Must Have	This can be configured in the system.
4	2.1.6.29	The System shall have the ability to link the Revenue and Taxation Code to the event	e.g.: Roll correction under property tax rules 51.5	Must Have	This can be configured in the system.
4	2.1.6.30	The system shall have the capability to hold multiple Social Sec #/ Tax Id(ITIN) against a parcel/Account#		Must Have	This can be configured in the system.
4	2.1.6.31	The system shall have the capability to mask/encrypt confidential information (e.g.: SSN) and only authorized users can access this data		Must Have	This is a native capability of Salesforce.com
4	2.1.6.32	The System shall have the ability to change all associated records when there's a change in information on a major/headquarter account		Must Have	This can be configured in the system.
4	2.1.6.33	The System shall have the capability to retain data for the pre-defined number of years		Must Have	Data is not automatically deleted from the system.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.6.34	The System shall have the capability to communicate/transfer data between various modules/sub-modules within the system	e.g.: Communication/hand-holding/data transfer between Real Property Roll and Business Personal Property Roll	Must Have	The system will be fully integrated.
3	**2.1.7**	**Calculations**			
4	2.1.7.1	The System shall provide authorized users with the ability to override any System-generated value with manual adjustments	The system shall also notify the supervisor about any override made in the system	Must Have	User override capability available.
4	2.1.7.2	The System shall maintain an audit trail of any manual corrections made to System-generated value including, but not limited to:		Must Have	File Maintenance performed in the system will be tracked.
4		a. User name			Please see the response to 2.1.7.2
4		b. Corrections made			Please see the response to 2.1.7.2
4		c. User-entered Notes (optional)			Please see the response to 2.1.7.2
4		d. Time/date stamp			Please see the response to 2.1.7.2
4		e. Roll name and address changes as entered by an authorized user			Please see the response to 2.1.7.2
4	2.1.7.3	If System configured values are adjusted, the System shall require a reason for the adjustment		Must Have	Reason Code Table Available.
4	2.1.7.4	The System shall have the capability to perform defined calculations	e.g.: CPI factor, Veteran's Exemption, Valuation Factors	Must Have	Calculations CPI, Vet Exm and Valuation Factors (multiplers,Adj,OBS, etc) available.
4	2.1.7.5	The System shall provide the capability to pre-configure, change and store calculations to be performed when initiated by authorized users		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
4	2.1.7.6	The System shall provide the capability for authorized users to drill-down to all available levels of data in any System-generated calculation		Must Have	This requested feature will be delivered as a constituent working function of the final delivered System.
3	**2.1.8**	**Analytics and Reporting**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.8.1	The System shall have the capability to generate a report/list of Assessor's Office activities on a preconfigured schedule including, but not limited to: a. Daily b. Weekly c. Monthly d. Quarterly e. Annually	Activities lists/reports include completed and open activities. The list of current reports are available in : Appendix 10 - List of Current Reports	Must Have	Salesforce offers a powerful suite of analytics and reporting tools to help you view and analyze your data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Reports: A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All our standard reports are "templates" so they can be used as report starting points from which users can alter fields, criteria, etc. and use the "Save As" function to easily capture a version more specific to their unique needs. Users can also create new custom reports to access exactly the information they need. Subtotal and limit data to help users analyze trends and get a concise picture of what is happening in your organization. Dashboards. A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or custom Visualforce pages. They provide a snapshot of key metrics and performance indicators for your organization. Each
4	2.1.8.2	The system shall provide the capability to generate ad-hoc reports		Must Have	Users can easily create ad-hoc reports.
4	2.1.8.3	The System shall provide the capability for authorized users to create and store pre-defined reports including, but not limited to: a. Performance tracking reports b. Statistical reports c. Exception/error reports		Must Have	See response to 2.1.8.1
4	2.1.8.4	The System shall provide the ability to generate/execute pre-defined reports as requested and scheduled in the System by authorized user(s)	e.g.: Exclusion Reports that needs to be submitted to BOE	Must Have	Reports can be scheduled to run at any interval.
4	2.1.8.5	The System shall be able to generate reports using previous or historical data as selected by an authorized user		Must Have	See response to 2.1.8.1
4	2.1.8.6	The System shall be able to store pre-configured queries, reporting templates, and reports as selected by an authorized user		Must Have	See response to 2.1.8.1
4	2.1.8.7	The System shall provide the capability to create dashboards at the levels of : a. Individual User b. Supervisor c. Manager d. Executive	With the functionality of Drill down and Drill-through	Must Have	See response to 2.1.8.1

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.8.8	The System shall provide the capability for authorized users to customize individual dashboard displays including, but not limited to:		Must Have	See response to 2.1.8.1
4		a. Work lists			See response to 2.1.8.1
4		b. Work list summaries			See response to 2.1.8.1
4		c. Pre-defined reports			See response to 2.1.8.1
4		d. Ad-hoc reports			See response to 2.1.8.1
4		e. Relevant upcoming deadlines/events			See response to 2.1.8.1
4	2.1.8.9	The System shall provide the capability for authorized users to drill down into dashboard summary items to see detailed information about the item		Must Have	Users can drill down from any dashboard element to view details.
4	2.1.8.10	The System shall have the capability to generate and send statistical reports to users on work flow items status, user, time to complete, etc.		Must Have	See response to 2.1.8.1
4	2.1.8.11	The System will provide the ability to generate aging reports of work items upon request and as scheduled		Must Have	See response to 2.1.8.1
4	2.1.8.12	The System shall provide monitoring/progress/aging/change reports to selected individuals based on defined business rules	Selected individuals could be Supervisors, Managers, Sr. Management etc.	Must Have	See response to 2.1.8.1
4	2.1.8.13	The System shall be capable of producing and delivering line item or en masses supervisory review and approval reports to pre-configured work queues on a weekly, monthly or otherwise determined schedule		Must Have	See response to 2.1.8.1
4	2.1.8.14	The System shall have the capability to generate various reports that needs to be submitted to BOE based on the pre-defined frequency	e.g.: Exclusion report for which the current frequency is once in a quarter	Must Have	See response to 2.1.8.1
4	2.1.8.15	The System shall have the capability to generate a list of existing exemption claimants with the corresponding details, grouped by type of exemption	This includes all types of exemptions	Must Have	See response to 2.1.8.1
4	2.1.8.16	The System shall have the capability to generate reports for Tax Segregation purposes, by the proposed APNs(that are split from the parent parcel) that are verified by the authorized users. The report shall include, but not limited to the following:		Should Have	See response to 2.1.8.1
4		a. Fiscal Year		Should Have	See response to 2.1.8.1
4		b. Requestor Name			See response to 2.1.8.1
4		c. Phone #			See response to 2.1.8.1
4		d. Date of Request			See response to 2.1.8.1
4		e. Tax Rate Area			See response to 2.1.8.1
4		f. Parent Parcel Number			See response to 2.1.8.1
4		g. Total Property Value, Land Value and Improvement Value of the Parent Parcel			See response to 2.1.8.1
4		h. Child Parcel Number(s)			See response to 2.1.8.1
4		i. Total Property Value, Land Value and Improvement Value of Each Child Parcel			See response to 2.1.8.1
4		j. Subdivision Name, Brief Legal Description			See response to 2.1.8.1
4		k. Condo Situs Address, Legal Description, Condo Owner Name, if available			See response to 2.1.8.1
4		l. Process Date, Staff Name and File Name			See response to 2.1.8.1
4	2.1.8.17	The System shall have the capability to retrieve the child parcel deed(s) for all the relevant child parcel(s) associated with the parent parcel of a Tax Segregation Request	The System shall have the capability to retrieve the deeds in the PDF Format	Must Have	This will be a capability of the system.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.8.18	The System shall have the capability to generate an annual report with the list of properties purchased/sold by Government entities(Government CIO Summary Report) and send to predefined users	This report can be used to check against the PI Usage report	Must Have	See response to 2.1.8.1
4	2.1.8.19	The System shall have the capability to generate reports pertaining to appeals with the corresponding details		Must Have	See response to 2.1.8.1
4	2.1.8.20	The System shall have the capability to generate reports pertaining to Business Personal Property Audits with the corresponding details	e.g.: total value by auditor, number of accounts completed. Pending, etc.	Must Have	See response to 2.1.8.1
4	2.1.8.21	The System shall have the capability to generate various exclusion and exception reports with pre-defined parameters controlling the resultant dataset		Must Have	See response to 2.1.8.1
4	2.1.8.22	The System shall have the capability to generate necessary reports to address the Subdivision Assessment Data Request(s) (Tax Request Form(s))		Must Have	See response to 2.1.8.1
4	2.1.8.23	The System shall have the capability to generate reports pertaining to Sales with the corresponding details	e.g.: Properties purchased by one entity for the last 5 years,	Must Have	Sales History file is unlimited.
3	**2.1.9**	**Address**			
4	2.1.9.1	The System shall be able to import/capture data from U.S. Postal Services and other third party address agencies (WorksRight Software's PER/ZIP4 tool) to confirm the formatting of all addresses entered into the System		Must Have	Address book contains the data elements required to accomodate the zip+4 and CASS certfificaiton.
4	2.1.9.2	The System shall provide the functionality to store address component pieces that are post office compliant, including: Street addresses, Post Office Box, Military Addresses (Overseas and Domestic), Rural routes and international	(http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf)	Must Have	Address table has the individual components that make up an address along with a formatted address for printing.
4	2.1.9.3	The System shall provide the functionality to validate addresses (using address validation software to be selected by the County) to provide validation, correction and standardization		Must Have	This interface will be custom designed, constructed and refined according to the user-defined requirements
4	2.1.9.4	The System shall store all historical addresses associated with a property, including source/reason for the change		Must Have	Address Book retires addresses not delete them, so account will retain historical addresses.
4	2.1.9.5	The System shall provide the functionality for storing additional location information. Examples include: GPS coordinates, Vessel's marina and slip, Aircraft's airport and tie down location, Manufactured Home's pad number, or others		Must Have	We can store additional location informaton. We can add user-defined fields to tables and user views.
4	2.1.9.6	The System shall provide the capability to store situs address different from the mailing address	The default option is the Situs Address	Must Have	They are stored independently.
4	2.1.9.7	The system shall have the capability to reference multiple situs addresses		Must Have	The system has a situs table that allows an account multiple situs
4	2.1.9.8	The System shall provide the functionality for a status to be associated with mailing addresses, for example: Undeliverable, Temporary, Assessor Approved, Pending Approval		Should Have	We have a status associated to each address.
3	**2.1.10**	**Penalties**			

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.10.1	The System shall provide the capability for authorized users to select and apply penalties to applicable parcels/accounts according to penalty type including, but not limited to: a. R&T Section 408 penalty b. R&T Section 501 BPS Late filing penalty c. LEOP penalty d. R&T Section 463 penalty e. R&T Section 441D penalty f. R&T Sect500 series penalty g. CIO 481 penalty h. Exemptions related penalty (late filing fee)	a. 408 Penalty - Home Owner's Exemption related b. 501 Penalty - for late filing of Business Property Statements c. LEOP - Legal Entity Ownership Program d. 463 Penalty - Penalty for failure to file annual Property statement e. 441D Penalty - Penalty for not making property records available for inspection by the Assessor Dept. f. 500 series penalty g. CIO 481 penalty - Confidentiality of COS and PCOR	Must Have	We are able to apply the given penalties and other fees to a single or multiple assessments.
4	2.1.10.2	The system shall have the flexibility to calculate the penalty amount from either the assessed value or a fixed dollar amount, not to exceed the maximum value amount		Must Have	Penalties can be cofigured to cap at a certain amount.
4	2.1.10.3	The System shall have the capability to display or identify penalty as a separate line item		Must Have	Penalties are carried as separate line items.
4	2.1.10.4	The System shall provide the capability for authorized users to select to waive or cancel penalties	When we waive or cancel penalties it should capture the reason code (R&T section code or other identifier)	Must Have	The penalties may be waived.
4	2.1.10.5	The System shall provide the capability to automatically notify the property owner of the penalties		Must Have	Accounts that have penalties can be qiueried and have an email/etter sent to inform them.
4	2.1.10.6	The System shall provide the capability to transmit the penalties to the Controller's Office	Transmission of penalties to Controller's can be set on a scheduled date	Must Have	All data pertaining to thecontroller can be transmitted/exported to the controller
4	2.1.10.7	The System shall provide the capability for tracking the penalties	For LEOPs we have to track the penalties	Must Have	Penalties can be tracked via transaction history file.
3	**2.1.11**	**Valuation**			
4	2.1.11.1	The System shall provide authorized users with the ability to place (enter) an assessed value on any event of any parcel regardless of parcel status including, but not limited to: 1. Active 2. Retired 3. Interim		Must Have	Authorized Appraisers are able to initiate a property valuation at any time.
4	2.1.11.2	The System shall provide authorized users with the ability to place (enter) an assessed value on any active account		Must Have	Assessed Values can be entered on an indivudual account with proper authorization.
4	2.1.11.3	The system shall have the capability to pull the market values (for and improvement) from the valuation system		Must Have	Valuation module is used to hold/import values from diffent valuation method, which can then be drawn into the assessment module.
4	2.1.11.4	The system shall have the capability to calculate the composite value based on the market value and the remainder factored base year values	CIO module defines the calculation details	Must Have	Calcuation to be defined can be deposited into the valuation modile
4	2.1.11.5	The System shall have the capability to save every event and the corresponding valuation and assessment information		Must Have	We can store an unlimited number of events and the corresponding valuation information.

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.11.6	The system should be able to cater for paired sales analysis based on a variety of pre-defined criteria.	Paired Sales Analysis is a technique used for estimating adjustments, estimating market conditions, and estimating adjustments for differences in physical characteristics. Examples of Criteria includes, but not limited to: 1. Displaying matched pairs(a matched pair is the sale and resale of the same property of highly similar property)) and the corresponding property details (e.g.: Market condition for time-adjustments) based on the query submitted by the authorized user(e.g.. of the query is.. Display all the properties that have gone through multiple sales in a defined period of time within a particular area)	Must Have	Pre-Defined query can be used for finding like comparables. Query can be modified to alter filter criteria.
4	2.1.11.7	The system shall have the capability of interfacing, importing/capturing data from different subscriptions and/or sources, e.g. CoStar, IREM, MLS, M&S, KORPAZ, NADA, Aircraft Bluebook Price Digest publicly available data sources, internal database which includes confidential and open data	This is also covered under interfaces M&S - Marshall & Swift	Must Have	The stated interfaces and imported dataset would have to be defined and developed.
3	**2.1.12**	**Field Inspection/Audit**			
4	2.1.12.1	The System shall provide the capability for authorized users to conduct field inspection/audits from the field through multiple means including but not limited to: a. Mobile devices b. Laptops	Users in the field should be able to connect to and access the System	Must Have	The proposed solution leverages the powerful and highly comprehensive nature of SalesForce technology which is operationally designed and constructed with all-inclusive 'Remote/Mobile' technology at it native "DNA" core. The following characteristics of the 'SalesForce' technology framework would at a minimum, be preeminently observable in the proposed solution: 1. Native design of SalesForce – part of the core "DNA" of SalesForce architectural construct 2. Not a "bolt-on" adaption of the overall software solution 3. Automatically attunes to any industry standard remote/mobile devise; i.e., laptop, tablet, smart phone 4. Provides native gateway to a full range of field data gathering functions; i.e., sketching, street-level imagery, aerial imagery files, GIS/shapefile [cadastral map] updates and etc. 5. Provides real-time interactive update capability to all individual commercial and residential property records via all remote/mobile field gathering technologies 6. Real-time update workflow avoids costly redundant-error prone human intervention

Level (1 - 4)	Item # (auto)	Requirements Description	Detailed Description	Priority	Proposer Comments
4	2.1.12.2	The System shall provide the capability for authorized users to directly upload to the System the data such as photos, videos, sketches or documents that are collected from the filed via smart phones, cameras or laptops.		Must Have	The proposed solution leverages the powerful and highly comprehensive nature of SalesForce technology which is operationally designed and constructed with all-inclusive ‘Remote/Mobile’ technology at it native “DNA” core. The following characteristics of the ‘SalesForce’ technology framework would at a minimum, be preeminently observable in the proposed solution: 1. Native design of SalesForce – part of the core “DNA” of SalesForce architectural construct 2. Not a “bolt-on” adaption of the overall software solution 3. Automatically attunes to any industry standard remote/mobile devise; i.e., laptop, tablet, smart phone 4. Provides native gateway to a full range of field data gathering functions; i.e., sketching, street-level imagery, aerial imagery files, GIS/shapefile [cadastral map] updates and etc. 5. Provides real-time interactive update capability to all individual commercial and residential property records via all remote/mobile field gathering technologies 6. Real-time update workflow avoids costly redundant-error prone human intervention
3	**2.1.13**	**Agency**			
4	2.1.13.1	The System shall maintain agency information as needed	Agency includes authorized individual(s) or attorneys	Must Have	We are able to store agency information.
4	2.1.13.2	The System shall provide the capability to display or notify authorized users that an individual is acting on behalf of an individual or entity if appropriate agent authorization has been submitted to the County		Must Have	This is a function of security and authorization.
4	2.1.13.3	The System shall provide the capability to display or notify authorized users that an attorney is acting on behalf of an individual or entity and agent authorization is not needed to be submitted.		Must Have	Agent table available to tag account