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# STATE OF INDIANA

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DEPARTMENT OF LOCAL GOVERNMENT FINANCE



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**TO:** County Assessors, County Auditors, and County Treasurers

**CC:** Software Vendors

**FROM:** James Johnson, Assistant Director of Data Analysis

**RE:** Conversion Certification Software Testing

**DATE:** March 8, 2016

The purpose of this memorandum is to provide guidance to county officials and software vendors on the protocol for conversion certification software testing.

Conversion certification testing pertains to those counties that have converted at least one module of their property tax management system, resulting in the county using a configuration different than the configuration the Department of Local Government Finance (“Department”) certified during Phase III software testing in 2015. Per the requirements in 50 IAC 26-18-6, if any major change is made to a property tax management system outside the two year period allotted for general certification testing, the system shall be considered a new system subject to certification again at the local level. The term “major change” is defined by 50 IAC 26-17-1 to mean significant alteration in the operation of the computer system, including changes such as the addition, modification, or removal of any feature that impacts data, features, or functionality. The Department considers the replacement of one or more modules of a county’s property tax management system with a different vendor’s software a major change. This change would include a conversion in any of the following modules of the property tax management system: CAMA, personal property assessment, oil & gas assessment, sales disclosure, and tax and billing. As a reminder, when a county converts a portion or all of its property tax management system, it must select a system that has been previously Phase I and Phase II certified by the Department.

Conversion certification testing will consist of the Department’s testing evaluator asking county users to demonstrate compliance in four testing areas. The testing scenarios that will be used during the conversion certification testing session are the same as those used during Phase III testing in 2015 and are attached to this memo. The Department would, however, like to note several differences between conversion certification testing and Phase III testing. First, it may not be necessary to cover all tests in the testing scenarios depending on the nature of the conversion. For example, if a county has converted only its personal property assessment module, the testing evaluator would not ask the county user to access a commercial real property record or expect to see a property split performed during testing. Second, conversion certification

testing may require the involvement of only one county office rather than both the county assessor and county auditor, depending on the nature of the conversion. For example, if a county converted only its tax and billing system, the Department would only need to work with either the county auditor or county treasurer's office during the testing session. Finally, unlike Phase III testing, which involved an onsite visit to the county, the Department will provide the option of asking the county personnel to demonstrate the tests via an onsite visit by the Department testing evaluator or via a virtual meeting environment such as a WebEx or a GotoMeeting session. The Department will coordinate with the county to determine which option is the most feasible.

For a county to stay current with its certification status, the Department requests that the county contact the Department shortly before deploying its new system for live use to notify the Department which module(s) the county is converting, the current software system it is using, and the software system it will be using following the conversion. This information should be sent to the Department's Data Mailbox at [data@dlgf.in.gov](mailto:data@dlgf.in.gov). Upon receipt of this information, the Department will follow up with the county to coordinate a date and time for a conversion certification testing session with the applicable county office and software vendor within 90 days of the county deploying its new system for live use. The Department is planning to allocate a total of one hour for the testing session; however, actual testing time may vary slightly depending on how many modules are being tested.

Upon conclusion of the conversion certification testing session – assuming that all tests have been successfully demonstrated – the Department evaluator will ask the applicable county office to send an email to the contact shown below, stating that representatives from the county have participated in conversion certification testing with the Department evaluator and have successfully demonstrated that the county's proposed system is in compliance with the standards and requirements of 50 IAC 26. The Department, then, will issue an official certification letter to the county, stating that the county's converted system has been locally certified and validated.

If you have any questions regarding this information, please contact Assistant Director of Data Analysis James Johnson at [jjohnson@dlgf.in.gov](mailto:jjohnson@dlgf.in.gov) or (317) 234-8274.