

OFFERING SUMMARY

December 4, 2017

CAPS BENEFITS

Productivity

Fred Pearson says that the use of the CAPS system allows us to “reduce bids on new reappraisal contracts by 25%”.

More information, quicker

Once again Fred Pearson says, “CAPS lets us know when appraisers start and stop, how many parcels they worked, how many vacant and improved.”

More photos

The photo capability helps in hearings, especially with outbuildings. By showing the photo, the taxpayer knows you’ve seen the property.

No printing cards, no lining up cards

Each appraiser carries an electronic copy of all property record cards.

IMPLEMENTATION

CAPS Application Software and Pre-Requisite Software

CoxCo has obtained from Pearson Appraisal rights to use and to license usage of the CAPS system, including any required pre-requisite software.

Equipment Setup and Support

The 2018 appraisal team in Durham includes “18 appraisers and 8 data entry staff working on various neighborhoods at different stages”. Each appraiser will have a Surface Pro. Each data entry person will have a work station and perhaps a second monitor.

CoxCo will perform one-time setup via GoToAssist (or perhaps a thumb drive) onto each Pro and each work station. The “setup” includes loading the aerial photography files, shape files, CAPS software, and pre-requisite software. Durham will need to provide access to each Pro and work station from outside its local network.

Durham will provide a PC that will be located inside the local network to serve as the “office server”. CoxCo will perform one-time setup the “office server” via GoToAssist.

CoxCo has setup and maintains a remote “sync-server” at its Charlotte location via GoToAssist to support the nightly CAPS data updates.

CoxCo will access/maintain a remote server from which CAPS software updates, if any, can be processed.

There will be times that CoxCo needs access to the Pros to install software updates or shape files. Durham should consider having a sub-inventory of Pros that could be swapped out when CoxCo needs to update the Pros.

OFFERING SUMMARY

December 4, 2017

Optional Auxiliary Equipment

Although not required for CAPS operations, certain auxiliary equipment may be beneficial: camera, car charger, GPS.

GoToAssist

GoToAssist is a software product which provides pc-to-pc connectivity. CoxCo will install GoToAssist on each of the Durham Surface Pros, work stations and server(s). CoxCo will access Surface Pros and servers via GoToAssist.

TRAINING, SUPPORT

CoxCo will train the field appraisers (18) and the data entry staff (8) in the usage of CAPS.

CoxCo will be the first and second line of CAPS support for the appraisers and data entry staff. CoxCo may call upon resources at Pearson for additional support.

CoxCo will provide a CAPS User Guide to each CAPS user.

TERMS OPTION AND COST

CoxCo will license CAPS under a one-time license fee plus annual support.

One-time License	\$40,000
Annual Support	\$20,000

Durham will reimburse CoxCo staff for off-of-pocket travel and lodging expenses consistent with policies/practices applicable to it own employees. CoxCo will obtain permission before expending travel and lodging expenses.

Both options will support the same range of Included Functionality. If Durham desires functionality not included, CoxCo will provide Enhanced Functionality on a cost per hour basis.

INCLUDED FUNCTIONALITY

GPS locator function.

The GPS locator function is beneficial to identify the parcel on the CAPS GIS Layer. Parked on the street in front of the parcel, the GPS shows cross-hairs on the CAPS GIS layer in the street in front of the parcel.

Parcel Image

CAPS supports the taking of parcel photo(s) by the Surface Pro hardware. The photos are linked to the PRC "called up" when the photo is taken. The quality of the photo may be improved by taking the photo with a separate camera, which is connected by blue tooth to the Pro.

OFFERING SUMMARY

December 4, 2017

A photo can be beneficial to identify the parcel or to document the reappraisal visit.

CoxCo will provide support for uploading the indexed photos.

Screen shot for Laserfiche.

CAPS can snap-shot the PRC including annotations into a PDF for export/storage in Laserfiche.

Load GIS shape files for Recent Qualified Sales.

Display Date Sold and Sale Amount on GIS layer.

Durham GIS will produce a shape file containing qualified sales over the past xx months. The data will include Sale Amount and Sale Date. If necessary CoxCo will prepare a file for consumption by Durham GIS for all parcels with qualified sales in the date range.

Ability to customize the Event labels

“Events” is a history of actions taken by Appraiser/Data Entry ... Who did What and When. CAPS provides 8 Event labels. The last Event is the one that controls the parcel color and Quick Search lists. Currently the labels are:

Field Check	Field Check Inaccessible
Office Review	Office Review Land
No Change	Business PP
Change	Reval Note

CoxCo will modify CAPS to customize the labels for Durham County as “included functionality.” Once changed, the new labels are static. In that sense customizing the labels is ONETax Standard Code.

Changing CAPS to support more than 8 Event labels would be Enhanced Functionality.

Support CAPS usage in the 3 different processes as identified below.

- **Field Canvassing**
 - An orderly parcel-by-parcel detailed inspection program of all improved properties.
 - Parcel layers
 - Orthos
 - Street
 - Address Numbers
- **New Construction/Work Orders**
 - Every parcel identified for inspection will have a corresponding work order status of ‘O’ or ‘W’
 - Parcel layers
 - Orthos
 - Street
 - Address Numbers

OFFERING SUMMARY

December 4, 2017

- **Final Value Review**
 - Inspection of all parcels
 - Recent sales must be clearly identified
 - Orthos
 - Street
 - Address Numbers
 - Sales
 - Flood Plain
 - Zoning

Support “Final Value Review” Process

Ability to add neighborhoods throughout the Final Value Review year.

CAPS will support staggering input/upload of PRC's as Durham determines necessary. CoxCo will develop a ONETax mechanism to create the PRCs and to track the neighborhood that have been uploaded... probably in a separate file.

Display parcels with qualified sales in a different color.

The Field Check event displays in Red.

Create a Quick Search list

There is list of parcels with “Field Check” event
Sub-set the list by specifying Neighborhood.

Show on the GIS Map layer: Sale Amount and Sale Date

Only Qualified Sales is filtered by the ONETax export

Support “New Construction/Work Orders” Processes

Day-End Export

After the CAPS nightly updates, CoxCo will provide a program on the Office Server to create an export .csv file from the Events table and place it in a /wsid sub-folder. The file will contain Parcel Id, Event, date/timestamp, and Appraiser/Worker ID.

On the ONETax side, CoxCo will write programs that import the Events export file and process it for purposes determined by Durham. Those purposes may include but are not limited to: creating/updating ONETax Work Orders, running reports or creating/exporting .csv files(s).

Identify CAPS parcels who've had New Construction

CoxCo will prepare a new ONETax menu option that creates an export file of all parcels who've had new construction and place the file in a \wsid sub-folder.

Selectable by Neighborhood

OFFERING SUMMARY

December 4, 2017

New CAPS option that processes the ONETax export file

To change the current Event for each parcel in that neighborhood to "Field Check".

CAPS program executes when a file is present in \wsid folder

Function runs from the Office Server.

Update #2 will pass data to PROs.

Generic Import Capability

Same process as New Construction and Qualified Sales

Works for any file exported from ONETax.

(Durham would manage the updates to avoid conflicts within a Neighborhood).

ENHANCED FUNCTIONALITY

Pull Additional Data Elements from PRC

Pull additional data elements from the PRC and to store those data elements in the CAPS database.

Current function: Neighborhood.

New function: for example, Sale Amount, Sale Date.

Add grid layer for more certain sketching

CAPS would support a grid template.

Appraisers would access the template then using the stylus sketch the improvement(s) on the grid.