transcendent TECHNOLOGIES

City of Manitowoc

Software / Services Proposal

Ascent

**Ascent Land Records Suite:
Property Listing, Assessment, Tax**

PRESENTED BY:

Steve Moore

Business Development Manager

Transcendent Technologies, llc

101 W Edison Ave, Suite 239

Appleton, WI 54915

March 18, 2016
(Pricing Valid 90 Days)

March 18, 2016

Steve Corbeille
Finance Director
City of Manitowoc
900 Quay St
Manitowoc, WI 54220

Thank you for providing us the opportunity to provide this proposal for your parcel management and tax billing needs at the City of Manitowoc. We feel we can provide a solution that will automate this process and provide a real productivity return on your investment.

The Ascent Land Records Suite has been designed and developed by a Wisconsin Based County with the same needs as you.   As a company, we saw great value in providing this excellent solution as a packaged application to other Counties and Municipalities in Wisconsin with a support mechanism to deliver product updates, enhancements, and ongoing support.

Please review this product summary and pricing below as we have discussed.   We are confident that you will find this product to be of excellent quality, easy to use, and well integrated to other applications such as imaging, GIS, and CAMA applications.   We have also provided pricing for the web inquiry applications to view public data and provide reports to users of such data if needed.

As part of our value proposition to the City of Manitowoc and our agreement as a value added software partner, it is our intention to supply both Software and Services to provide a total solution to Manitowoc. We have experience in the implementation of similar solutions at various counties, and municipalities, within Wisconsin. We pride ourselves in customer satisfaction based on the feedback we receive from our customers.

Sincerely,

Steve Moore
Transcendent Technologies, LLC
Business Development Manager
920-750-5891
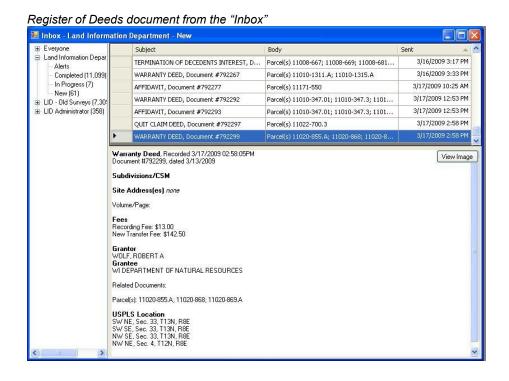smoore@transcendenttech.com

SOFTWARE SOLUTION OVERVIEW

Benefits / Overview – Land Records Suite

The Ascent Land Records Suite is an integrated property listing, assessment, and tax billing application.   Integration to other government applications is core to the product and provides end-to-end management functions with built in workflow.   An inbox concept routes various documents recorded in the Counties Register of Deeds application to the Property Listing / Assessor's department for parcel management functions, and updates tax billing records in an automated process.
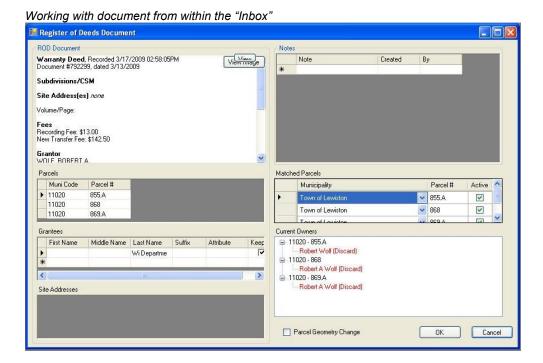
Ascent is written using the Microsoft ASP.NET MVC framework. It uses a Microsoft SQL Server backend. Ascent handles all facets of the parcel and property tax lifecycle. It has three main components: the Windows GUI that is used for data input, the database that is used for data storage and stored procedure execution, and the web application that is used by the public for parcel, tax, and document lookup.

User Interface and Process Workflow

Parcel owner changes and most subdivision of parcels are initiated in the County Register of Deeds (ROD) office with various recorded documents. The ROD staff enters information about these documents in the ROD Database Application. Ascent has a SQL Server stored procedure that runs every 15 minutes to check for any new documents entered by the ROD.   When a new document is found, information about that document is put into the "inbox" to notify the Land Information Department (LID) staff.

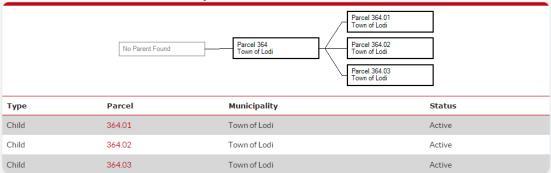*Register of Deeds document from the "Inbox"*

The Real Property Lister / Assessor views the inbox throughout the day and takes the necessary actions. From the inbox, the Property Lister / Assessor can view the information that was entered into the ROD Application, as well as view the scanned document. For all documents, the first step is to verify that the parcel numbers entered from the recorded document are for the correct parcels in Ascent. The parcels must be checked to ensure that they match the legal description in the document, and also that the parcels are currently "active". For ownership changes, the Property Lister / Assessor has a screen where they can simply copy the owner names entered by the ROD into Ascent.

Working with document from within the "Inbox"

For documents that change the shape of a parcel, a "geometry change" is entered. The geometry change dialog lets you graphically relate one or more parent parcels to one or more new child parcels. Once all of the new parcel information has been entered into the geometry change screen, the software deactivates the existing parent parcels and creates any new child parcels. For geometry changes, the Property Lister / Assessor can send notices to a separate inbox for the GIS staff to update the city's official maps.

Ascent takes advantage of current relational database models to track the history of a parcel. This allows the use of a retiring parcel system to better track the history of a parcel and provide a graphical representation of the parent child relationship of a parcel. This process eliminates the need to maintain and interpret notes to identify and determine the origin of a parcel. Below you can see how this parent child relationship is viewed and easily tracked.
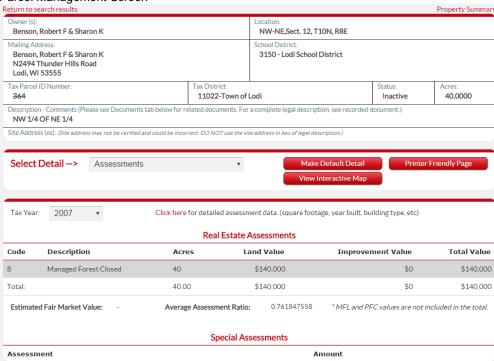
Parcel Information Tab – Parcel History

Type	Parcel	Municipality	Status
Child	364.01	Town of Lodi	Active
Child	364.02	Town of Lodi	Active
Child	364.03	Town of Lodi	Active

For daily parcel inquiry and maintenance tasks, Ascent has a tax parcel detail screen. This screen also contains an area where any authorized staff can add notes about the parcel. These notes can be set to be viewed by everyone, or only by a specific department. The detail screen shows all information about a particular parcel, including:

- ❖ School District
- ❖ Owners
- ❖ USPLS Location
- ❖ Parcel Notes
- ❖ Mailing Addresses
- ❖ Summary of Assessments
- ❖ Summary of Property Taxes
- ❖ Associated ROD Documents
- ❖ Surveys

Parcel Management Screen

Return to search results   Property Summary

Owner (s):	Location:
Benson, Robert F & Sharon K	NW-NE,Sect. 12, T10N, R8E

Mailing Address:	School District:
Benson, Robert F & Sharon K N2494 Thunder Hills Road Lodi, WI 53555	3150 - Lodi School District

Tax Parcel ID Number:	Tax District:	Status:	Acres:
364	11022-Town of Lodi	Inactive	40.0000

Description - Comments (Please see Documents tab below for related documents. For a complete legal description, see recorded document.):
NW 1/4 OF NE 1/4

Site Address (es): *(Site address may not be verified and could be incorrect. DO NOT use the site address in lieu of legal description.)*

Select Detail --> Assessments ▼   Make Default Detail   Printer Friendly Page   View Interactive Map

Tax Year: 2007 ▼   Click here for detailed assessment data. (square footage, year built, building type, etc)

Real Estate Assessments

Code	Description	Acres	Land Value	Improvement Value	Total Value
8	Managed Forest Closed	40	$140,000	$0	$140,000
Total:		40.00	$140,000	$0	$140,000

| Estimated Fair Market Value: | - | Average Assessment Ratio: | 0.761847558 | *MFL and PFC values are not included in the total.* |

Special Assessments

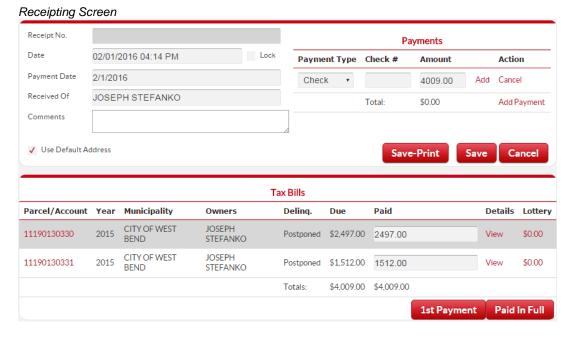| Assessment	Amount

As the yearly assessment process begins, the land information department staff takes a snapshot of all active real estate parcels and use this data to prepare various reports and data extracts that are sent to the assessors. This process is also known as creating the assessment roll. Most assessors have assessment programs that they import the data into; others use the property assessment worksheet, an excel spreadsheet that Ascent creates. In either case, the assessor submits their assessment changes back to the city electronically, which is then imported back into the system.

The City's financial department fills out the state aid and levy information in and online web form to compute the mill rates. Once this data has been verified the software computes the property taxes. From there, the tax bills are created as a PDF file and can be sent via FTP to a vendor that handles the mailing, or printed and mailed internally if the city chooses.

Receipting can be done "real time" by the City, any financial institutions, and escrow companies. Ascent creates the various reports required by the state for the interim and PC501 settlements. Once the settlements have been processed information is sent to the County to handle the certificate processing and delinquent collections.

Every tax bill has a unique barcode printed on it, which speeds processing and increases accuracy when receipting tax payments. A single tax payment receipt can handle payments for multiple parcels and multiple tax years. Each receipt can also have multiple payment methods. For example, a taxpayer could bring in an escrow check from their mortgage company, a personal check and cash. Receipts can be reprinted at any time and the payment information is available online immediately after receipting.

Receipting Screen

Other Features

Documents can be attached to surveys and parcels. This can be in the form of existing electronic files or scanned documents. For example, correspondence with property owners or attorneys is sometime attached to the relevant tax parcel. Also, surveys that do not pass

through the ROD department, such as Mortgage Inspections, are scanned and attached to the survey record (Additional Module Required).

All reports are generated as PDF files. This allows the user to email or archive any report that they choose. Also, this has reduced the amount of paper used each year because most reports are distributed electronically rather than via paper. Generating the reports as PDF files also allows them to be made available in real-time via the web.

Summary of Benefits
- ❖ Creates an efficient data model and overall work flow instead of departmentalized business silos
- ❖ Inbox concept eliminates redundant data, eliminates the need to route paper documents, and notifies the appropriate departments that changes and additions have been made to parcels, indexes, or legal documents.
- ❖ Improves data accuracy with automated error checking
- ❖ Provides new reports
- ❖ Easy to import / export various data for exchange between local governments, state departments, and private industry
- ❖ Flexible data model allows for future expansion and integration to other departmental needs
- ❖ Pick lists from database for many things such as assessment codes, school districts, town/range, municipal codes, etc.

Summary of Benefits to the Property Lister
- ❖ Streamlined assessment, mill rate/tax bill generation process
- ❖ Data validation and error checking built in
- ❖ Ability to track reasons for changes and use sticky notes for visibility during workflow process
- ❖ Automated interaction with Assessors, Clerks, Treasurers, Register of Deeds, and GIS
- ❖ Bulk change process for mailing addresses, notes, etc.
- ❖ Automated tax parcel split process and history development
- ❖ Alerts if parcel is listed with MFL or other special districts
- ❖ Automated transfer of data from parent parcel to child parcels (names, school codes, addresses, other data)
- ❖ Multiple address type management
- ❖ Instant access and availability of recorded ROD data and images
- ❖ Assessment data import / export in various electronic and print formats
- ❖ Manages personal property parcels
- ❖ Enhanced searching and reporting capabilities

Summary of Benefits to the Treasurer
- ❖ Streamlined receipting process and settlement processes
- ❖ Integrates with J. Mauel Property Tax Collection for municipalities
- ❖ Integrates with MailCom Consulting for printing and mailing of tax bills
- ❖ Multiple years and multiple parcels on one receipt
- ❖ "Note" fields to add comments to receipts
- ❖ Options to print or not-print receipt
- ❖ Use of bar codes for receipting purposes (extra costs for hardware)
- ❖ Detailed monthly and daily reports

- ❖ Electronic generation of vouchers and journal entries with details for accounting department
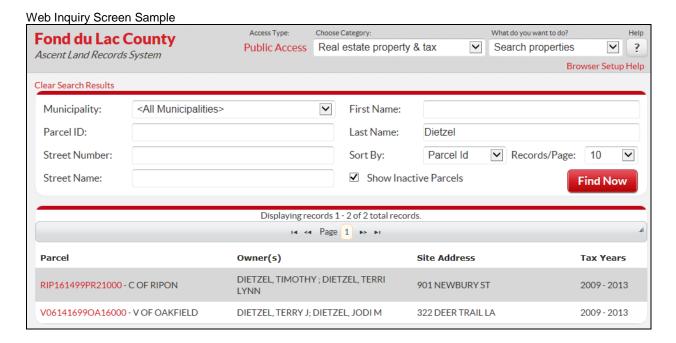- ❖ Ability to create and provide various reports
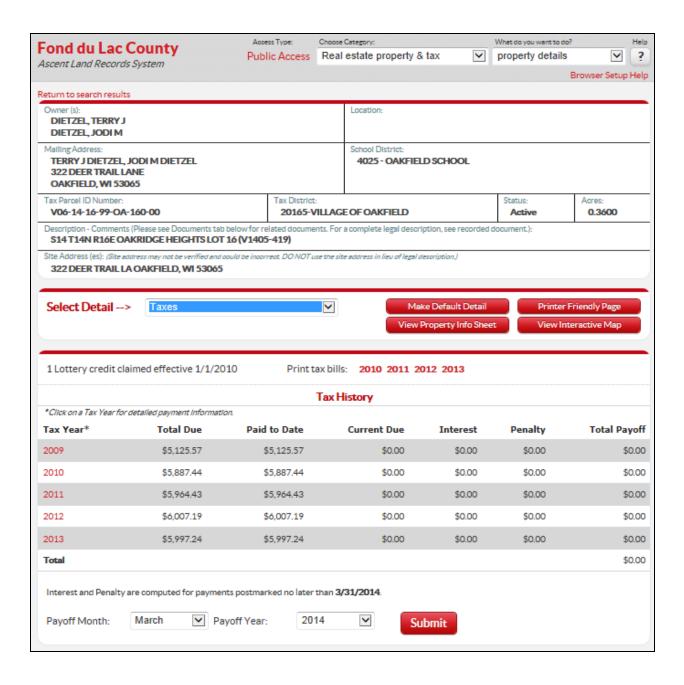
Web Inquiry Applications

Most of the data stored in Ascent can be available on the web. The windows and web application use the same database, so any new parcels or tax payments appear on the web the instant they are entered into the internal window application.

The tax parcel search allows the web user to search for parcels using a number of search criteria. Once the user has located a parcel, they can view most of the information from Ascent. This includes: detailed assessment history, detailed tax history, tax bills, tax payments, official city parcel maps, all linked ROD documents, most linked surveys, and child and parent parcels.

Security Data Flags

Searching for tax parcels can be restricted by indicating that a parcel is private. This setting is changed in the client application. If a parcel is marked as private, it will not turn up in any search results by owner name. If a user locates a private parcel by address, parcel number, etc., the owner name and address will not be shown.

Web Inquiry Screen Sample

Fond du Lac County	Access Type:	Choose Category:	What do you want to do?	Help
Ascent Land Records System	Public Access	Real estate property & tax ⌄	Search properties ⌄	?

Browser Setup Help

Clear Search Results

Municipality:	<All Municipalities> ⌄	First Name:	
Parcel ID:		Last Name:	Dietzel
Street Number:		Sort By:	Parcel Id ⌄ Records/Page: 10 ⌄
Street Name:		☑ Show Inactive Parcels	**Find Now**

Displaying records 1 - 2 of 2 total records.

⏮ ◀ Page 1 ▶ ⏭

Parcel	Owner(s)	Site Address	Tax Years
RIP161499PR21000 - C OF RIPON	DIETZEL, TIMOTHY ; DIETZEL, TERRI LYNN	901 NEWBURY ST	2009 - 2013
V06141699OA16000 - V OF OAKFIELD	DIETZEL, TERRY J; DIETZEL, JODI M	322 DEER TRAIL LA	2009 - 2013

Fond du Lac County
Ascent Land Records System

Access Type:	Choose Category:		What do you want to do?	Help
Public Access	Real estate property & tax	▾	property details	▾	?

Browser Setup Help

Return to search results

Owner (s):	Location:
DIETZEL, TERRY J	
DIETZEL, JODI M	

Mailing Address:	School District:
TERRY J DIETZEL, JODI M DIETZEL	**4025 - OAKFIELD SCHOOL**
322 DEER TRAIL LANE	
OAKFIELD, WI 53065	

Tax Parcel ID Number:	Tax District:	Status:	Acres:
V06-14-16-99-OA-160-00	**20165-VILLAGE OF OAKFIELD**	**Active**	**0.3600**

Description - Comments (Please see Documents tab below for related documents. For a complete legal description, see recorded document.):
S14 T14N R16E OAKRIDGE HEIGHTS LOT 16 (V1405-419)

Site Address (es): *(Site address may not be verified and could be incorrect. DO NOT use the site address in lieu of legal description.)*
322 DEER TRAIL LA OAKFIELD, WI 53065

Select Detail --> | Taxes ▾ | | **Make Default Detail** | **Printer Friendly Page** |
| | | **View Property Info Sheet** | **View Interactive Map** |

1 Lottery credit claimed effective 1/1/2010   Print tax bills: **2010 2011 2012 2013**

Tax History

Click on a Tax Year for detailed payment information.

Tax Year*	Total Due	Paid to Date	Current Due	Interest	Penalty	Total Payoff
2009	$5,125.57	$5,125.57	$0.00	$0.00	$0.00	$0.00
2010	$5,887.44	$5,887.44	$0.00	$0.00	$0.00	$0.00
2011	$5,964.43	$5,964.43	$0.00	$0.00	$0.00	$0.00
2012	$6,007.19	$6,007.19	$0.00	$0.00	$0.00	$0.00
2013	$5,997.24	$5,997.24	$0.00	$0.00	$0.00	$0.00
Total						$0.00

Interest and Penalty are computed for payments postmarked no later than **3/31/2014**.

Payoff Month: | March ▾ | Payoff Year: | 2014 ▾ | **Submit**

PRICING SUMMARY (Land Records / Taxation)

This information is confidential and will not be shared with anyone outside of Manitowoc.

Software (Land Records Suite)

Qty.	Description	Price
(5k increments)	**Ascent Software**	

15,000	Ascent Core Database Applications
	   o Parcel Management
	   o Personal Property Account Management
	   o Assessment Management
	   o Survey Management
	   o Tax Bill Generation
	   o Settlement Process
	   o Receipting
	   o Tax Certificate Processing (County Data Transfer)
	   o Reports / Exports
	   o Basic Integration (Import/Export)
	        ■ Assessor Data Exchange (TCWin, MarketDrive)
	   o Priced per parcel ($1.50)
		$22,500

15,000	Ascent Web Access (Public/Municipality)
	   o Tax Parcel Data Search
	   o Survey Search
	   o Special Assessment Entry
	   o Levy/Mill Rate Entry
	   o Reports/Exports
	   o Priced per parcel (.35)
		$ 5,250

	Total – Software	***$27,750***
	Ascent Land Records Advanced Integration Modules (Optional)	

	Ascent Credit Card Payment Module
	   o Provides integration with Point & Pay for credit card and electronic payment processing
	   o Available on public web portal for customer self service.
	   o Payment confirmation process for verifying deposits
	   o Shopping cart type experience with suggestive searches for ease in processing (other unpaid tax bills with same address)
	   o Requires the municipality to have an account and agreement with Point & Pay
		$ 1,000

	Ascent Bank Payment Processing Module
	   o Secured access for bank users
	   o Provide ability to receipt payments via web interface
	   o Payments immediately available via website
	   o No need to export/import files
		No Charge

Software Maintenance (Annual Cost)

Qty.	Description	Price
	Ongoing Maintenance & Support o Product updates & enhancements o Online and telephone support o State mandated changes	
	Ascent Software	
15,000	Core Database Application Maintenance and Support: ▪ Priced per parcel	$ 5,500
15,000	Web Access Maintenance and Support: • Priced per parcel	$ 1,000
	Total – Maintenance	*$ 6,500*
	Ascent Advanced Integration Modules (Optional)	
	Ascent Credit Card Payment Module • Maintenance and Support	$ 250
	Ascent Bank Payment Module • Maintenance and Support • Priced per bank branch collecting $300/branch • Pricing assumes 11 Bank branches	$ 3300

Data Migration & Implementation Services:

Description of Services	Price
▪ Implementation Planning & Management o Estimated 10 hours ▪ Data Analysis o Estimated 10 hours ▪ Data Migration Services (includes testing) o Estimated 80 hours o Estimate includes migrating 3 years of payment and assessment history ▪ System Implementation and Configuration o Estimated 5 hours ▪ Training o Estimated 40 hours ▪ Integration setup and testing for GIS o Estimated 5 hours	$115/hr (150 estimated hours)

	Ascent Land Records Advanced Integration Modules (Optional – Recommended Future)	

	County Register of Deeds Integration/Workflow Module
	  ○ ***Suggested future module – requires coordination and integration with the County and is dependent on what type of connectivity and services are available from the County***
	  ○ Provides integration with the County Register of Deeds Software
	  ○ Creates inbox workflow entries when documents are recorded in the Register of Deeds system
	  ○ Transfers information into Ascent to eliminate the need to retype information that has already been entered
	  ○ Provides automatic document linking to provide a history of documents related to the parcel
	  ○ Provides easy access to the Register of Deeds information from within the Ascent user interface
	  ○ Annual maintenance $500/year
		$ 2,000

	Ascent Image System Integration
	  ○ ***Suggested future module – requires coordination and integration with the County and is dependent on what type of connectivity and services are available from the County***
	  ○ Provides seamless integration with Document Imaging Software
	  ○ Provides the ability to easily view the scanned image from within the Ascent user interface.
	  ○ Annual maintenance $400/year
		$ 1,500

	Ascent Sales History Module
	  ○ ***Suggested future module – requires coordination and integration with the County and is dependent on what type of connectivity and services are available from the County***
	  ○ Requires integration with Register of Deeds software
	    Provides sales information on a particular parcel via public web portal
	  ○ Provides sales information based on date parameters for a specific geographical area via the public web portal
	  ○ Annual maintenance $300/year
		$ 1,000

	Ascent eRETR integration
	  ○ ***Suggested future module – requires coordination and integration with the County and is dependent on what type of connectivity and services are available from the County***
	  ○ Provides integration with the States electronic transfer return system
	  ○ Copies correct mailing address and eliminate the need to key this information into LRS.
	  ○ Posts corrected or updated parcel numbers back to the State eRETR system as they have requested from the Counties.
	  ○ Eliminates the need to have to log into the States eRETR system.
	  ○ Annual maintenance $300/year
		$ 1,000

This Proposal is agreed and accepted by:

Transcendent Technologies, LLC   **City of Manitowoc**

By: _____   By: _____

Name: _____   Name: _____

Title: _____   Title: _____

Date: _____   Date: _____

Transcendent Technologies, LLC   **City of Manitowoc**

By: _____   By: _____

Name: _____   Name: _____

Title: _____   Title: _____

Date: _____   Date: _____