COLLECTOR'S OFFICE CONVERSION

INTERNAL AND EXTERNAL CUSTOMER SERVICE CHANGES

Vendor: Quality Data Service, Inc.

- Connecticut based firm established in 1981
- Connecticut's leading tax software vendor
  - Over 125 CT municipal clients and over 65 Ct districts and boroughs
  - Leading edge software development technology and data base conversion
- Up to date on ALL Connecticut requirements
  - Close working relationship with Office of Policy and Management (OPM)
  - Handle all State Reporting and File Transfer Requirements
- Employee Qualifications
  - Certified Assessor CCMA II
  - Certified Tax Collector CCMC

INQUIRY PRINTOUTS - OLD

Town of Mansfield Collection System

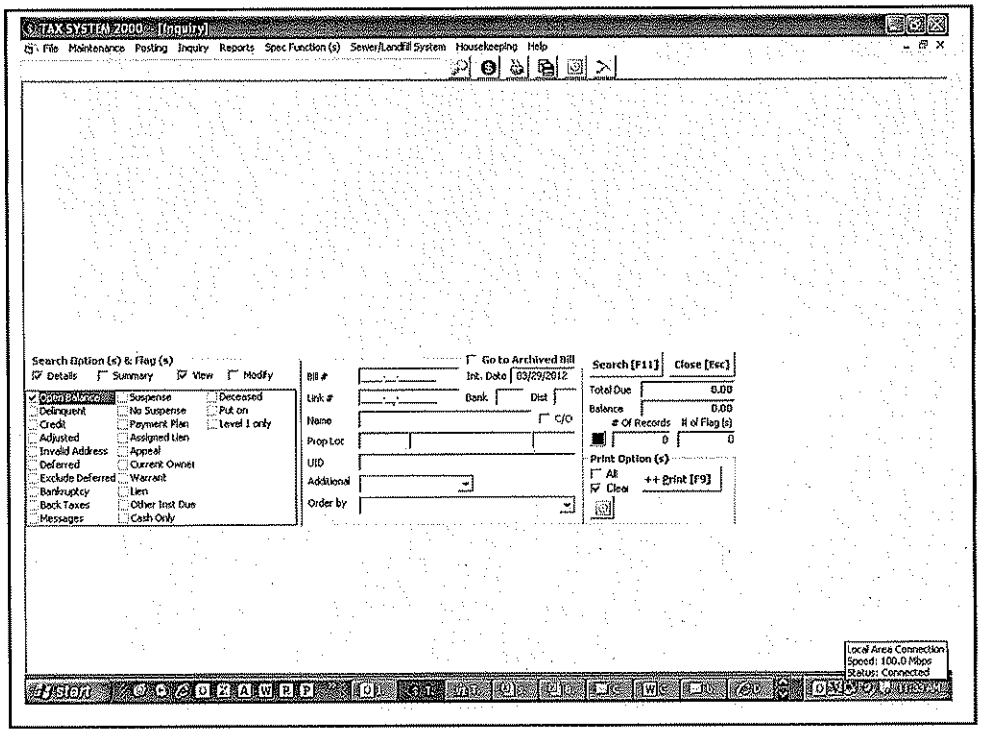
Transaction Header

Eff: LO Trans: 00000000
Int: Oper: Reg: 00
Act:

PF2-Back,Next-Act Real Estate Bill 2010 R00005
211 HUNTING LODGE LLC
47 DEMING STR SOUTH WINDSOR CT 06074 672 176
211 HUNTING LODGE RD 0008 0021 0006

	1st pmt	Int	2nd pmt	Int		Liens	Penalties
Billed	2,242.99		2,242.99		1	.00	.00
Abated	.00		.00		2	.00	.00
C of C	.00		.00		Tot	.00	.00
Total owed	2,242.99		2,242.99				
Payments	2,242.99	.00	.00	.00	1	.00	.00
Refunds	.00	.00	.00	.00	2	.00	.00
Total paid	2,242.99	.00	.00	.00	Tot	.00	.00
Carryover int		.00		.00			
Last pmt on 08/01/2011		.0		6.0%	Net Liens,Pen		.00
Calc int		.00		134.58			
Total due	.00	.00	2,242.99	134.58	.00 --->		2,377.57

MANSTAX |CLG|01|CG|12/19/2011|04/11/2012|12 9:39 AM (C)R/A



INQUIRY PRINTOUTS - NEW

```
                                                                                                                  *2010010000000*
GENERAL DATA REAL ESTATE TOWN OF MANSFIELD                                                                        AS OF 03/29/2012

BILL NO:          2010-01-0000005          ORIGINAL OWNER:      211 HUNTING LODGE LLC
UNIQUE ID:        0000 0021 0004           C/O:
LINKS                                      ADDRESS:             47 BENDIX STE
FILES                                      ADDRESS2:
BANK:                                      CITY OF ZIP:         SOUTH WINDSOR CT 06075
EXCHGN:                                    COUNTRY:
VOL/PAGE:         672-176                  PROP LOC.:           211 HUNTING LODGE RD
LIEN VOL/PAGE:                             SUB PROP LOC:
DISTRICT:         0
                                           M/B/L:               0000 0021 0004

DROP ADDRESSED:        168,140             OLD CODE:            0
EXEMPTIONS:                                EXEMPT CHANGE:
CDC CHANGE:
NET VALUE:             168,140
MILL RATE:        26.6800

*** BILLED ***
                        TOWN                                                                  TOTALS
INST1:                2,242.99                                                              2,242.99
INST2:                2,242.99                                                              2,242.99
INST3:                    0.00                                                                  0.00
INST4:                    0.00                                                                  0.00
ADJN:                     0.00                                                                  0.00
TOT TAX:              4,485.98                                                              4,485.98
TOTAL PAID:           4,485.98                                                              4,485.98

*** PAYMENTS ***

TYPE      CYCLE     DATE          ADJ      TOWN/BATCH/ENG     INST      AMOUNT      INTEREST      LIENS      FEES      TOTAL
Pay       2         02/01/2012                 5/46/58          2      2,242.99         0.00       0.00       0.00      2,242.9
Pay       2         08/01/2012                 1/1120083/2      1      2,242.99         0.00       0.00       0.00      2,242.9
                    TOTAL PAYMENTS:                                   4,485.98         0.00       0.00       0.00      4,485.9

TOTAL BALANCE DUE AS OF 03/29/2012
                                        TOWN
INT DUE:                                0.00
LIEN DUE:                               0.00
FUND DUE:                               0.00
TAX DUE NOW:                            0.00
TOT DUE NOW:                            0.00
BALANCE DUE:                            0.00

*** FLAGS ***
Circuit Breaker Amount:  0                 Benefit Year:          0
Invalid Address Flag     No
MESSAGES
211 HUNTING LODGE RD
```

TAX ACCOUNT INFORMATION

PRINTOUT OPTIONS - OLD

- INQUIRY OF BILL INFO
- INQUIRY OF LIMITED ASSESSMENT INFO
- BILLS (ONLY ONCE)
- DELINQUENT (ONLY ONCE)

PRINTOUT OPTIONS - NEW

- PRINT INFORMATION DOZENS OF WAYS SUCH AS
  - SCREEN PRINT
  - DETAILS
  - NEW BILL WITH 1 PART, 2 PARTS AND 3 PARTS
    - NEW BILLS, LATE BILLS, FINAL DEMANDS,

OTHER FUNCTIONALITY GAINED

OLD SYSTEM

- REFUNDS – NONE
- MESSAGES – DID NOT EXIST
- PAYMENTS – NO RECEIPT OTHER THAN INQUIRY PRINTOUT
- TAX SEASON INFORMATION – ON MULTIPLE INQUIRY PRINTOUTS

NEW SYSTEM

- PROCESSED IN QUALITY
- MESSAGES CAN BE WRITTEN PERSONALLY AND SYSTEM NOTATES WHEN ACTIONS ARE PERFORMED
- PAYMENTS – REGISTER PRINTS RECEIPT
- ONE REPORT WITH ALL PAYMENTS DURING THE YEAR.

TAX SYSTEM IS NOW REVENUE SYSTEM

PAYMENTS NO LONGER NEED TO BE SEPARATED!

PAYMENTS AND ACCOUNT INFORMATION IN ONE PLACE FOR

- TAXES
- SEWER
- REFUSE
- INSURANCE
- MISCELLANEOUS BILLING

TAX BILL PRINTING EFFICIENCY

MULTIPLE CARS ON ONE BILL

- REDUCED
  - PAPER COSTS
  - POSTAGE
  - PROCESSING TIME BY COLLECTOR STAFF

ON-LINE BILL INQUIRY AND PAYMENT CENTER

INTERNAL AND EXTERNAL CUSTOMER SERVICE CHANGES

NEW ONLINE INQUIRY AND PAYMENT CENTER

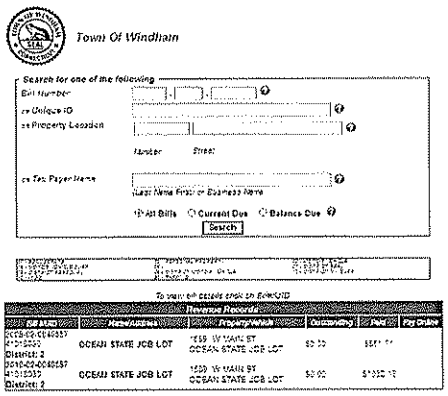
ACCESSIBLE THROUGH EACH TOWN'S WEBSITE

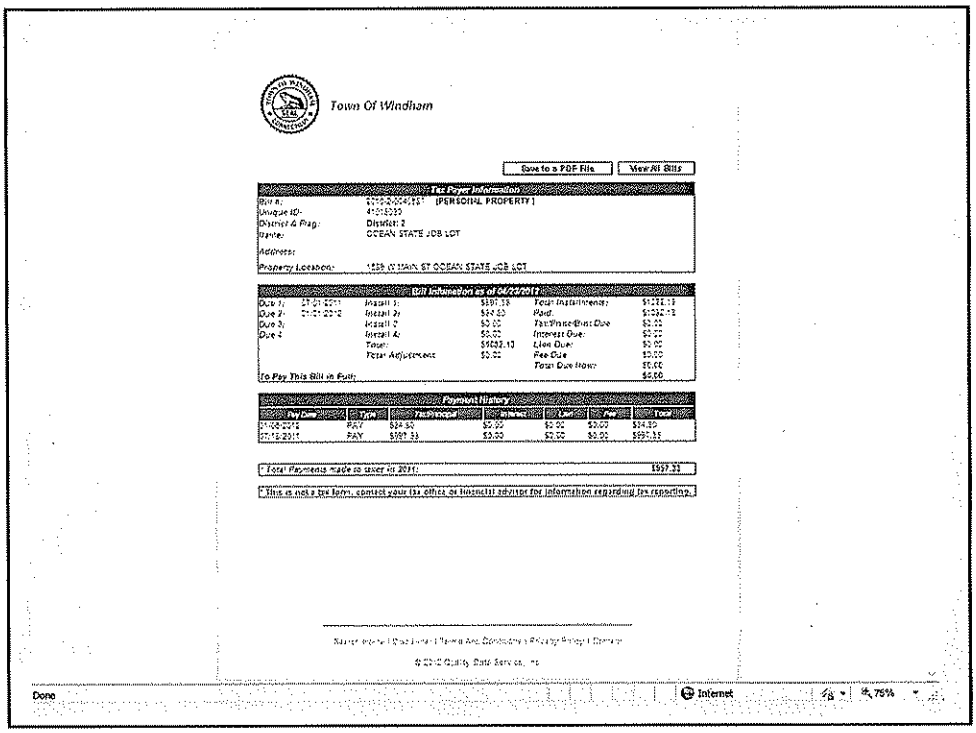
AND

WWW.QDS.BIZ QUALITY DATA SERVICES WEBSITE

TOWNS WITH INQUIRY

ASHFORD	KILLINGLY	STONINGTON
BETHANY	LEBANON	STRATFORD
BETHEL	LISBON	THOMPSON
BRANFORD	MANCHESTER	VERNON
BRIDGEPORT	MORRIS	WATERBURY
BROOKFIELD	MONTVILLE	WESTBROOK
CHAPLIN	NEW CANAAN	W. HARTFORD
CHESHIRE	NEW FAIRFIELD	WESTON
E. HAMPTON	NEWTOWN	WESTPORT
E. HARTFORD	NORWICH	WETHERSFIELD
E. WINDSOR	PLYMOUTH	WILTON
GLASTONBURY	PORTLAND	WINDHAM
GOSHEN	REDDING	WINDSOR
HADDAM	SIMSBURY	WINDSOR LOCKS
HAMPTON	SOMERS	WOLCOTT
HEBRON	SOUTHBURY	WOODBURY





PAPER-FREE OPTIONS COMING

- TAXPAYERS WILL BE ABLE TO
  - SUPPRESS THEIR PAPER BILLS
  - REQUEST E-BILLS AND HAVE E-MAILED BILLS ONLY
  - E-MAIL REMINDERS WILL BE AVAILABLE (FOR 2ND INSTALLMENT AS WELL)
  - IRS TAX INFORMATION WILL BE AVAILABLE 24/7 ON OUR WEBSITE

IMPROVEMENTS SUMMARY

- COMPLETENESS –
  - INQUIRIES ARE MORE COMPREHENSIVE HENCE REDUCING RISK OF MISSING A BILL THAT IS DUE.
- ACCURACY –
  - LESS MANUAL EFFORTS REDUCING RISK OF CLERICAL ERRORS.
  - RECEIPTS TO CUSTOMERS FOR THEIR TRANSACTION.
  - ADDED AUDIT TRAIL OF MACHINE TAPE FOR VERIFICATION OF ACCURACY.
  - EACH PROCESS IS TRACKED IN THE PROGRAM FOR INVESTIGATING AND SOLVING ISSUES
- BETTER CUSTOMER SERVICE
  - NO LONGER SEPARATING PAYMENTS FOR TRASH AND TAX
  - EASIER TAX REPORTING PROCESS FOR IRS INFORMATION
  - INFORMATION OF ASSESSMENT AND TAX ON ONE PAGE REDUCES THE NEED TO ASSESSOR OFFICE
  - ABILITY TO E-MAIL INFORMATION TO CUSTOMER REDUCING IN-OFFICE TRAFFIC.
  - GEARING UP FOR ELECTRONIC PAYMENTS AT IN-OFFICE KIOSK

IMPROVEMENTS SUMMARY (CON'T.)

- EFFICIENCIES:
  - AUTOMATION OF
    - REFUNDS
    - LIENS
    - LIENS RELEASES
    - TAX DEMANDS
    - MOTOR VEHICLE RESTRICTIONS AND RELEASES
    - TRANSFERS OF PROPERTY
    - LESS CUSTOMER TRAFFIC AND CALLS– 24/7 INFORMATION ON-LINE
  - PROBLEM SOLVING/RESEARCH
    - MESSAGING ON THE SYSTEM –
    - ABILITY TO TRACK TYPES OF ACCOUNTS
    - A TEAM OF KNOWLEDGE ALL AROUND THE STATE

ASSESSOR'S OFFICE CONVERSION

INTERNAL AND EXTERNAL CUSTOMER SERVICE CHANGES

CAMA VS. ADMINISTRATION - TWO DIFFERENT ANIMALS

C.A.M.A. - **C**OMPUTER **A**IDED **M**ASS **A**PPRAISAL

- VALUATION AND MAINTENANCE OF REAL PROPERTY

ADMINISTRATION -

- ALSO KNOW AS "HOUSEKEEPING"
- PRODUCES ANNUAL GRAND LIST (REAL ESTATE, PERSONAL PROPERTY & MOTOR VEHICLES)
- ANNUAL REPORTS TO STATE OF CT
- MANAGES STATE AND LOCAL PROGRAMS: ADDITIONAL VETERANS, ELDERLY, TOTALLY DISABLED, BLIND, ACTIVE-DUTY MILITARY & AMBULATORY VEHICLES, ETC.
- "BRIDGES" TO TAX COLLECTION OFFICE FOR BILLING.

INQUIRY – ACCESS TO INFORMATION
REAL ESTATE – OLD SYSTEM

```
ASSESSOR'S REAL ESTATE FILE                          TRANSFER INFORMATION
R00001 NAME: 101 HUNTING LODGE LLC                   DATE:            02/09/09
       2ND:                                          CLASSIFICATION:
       ADDRESS: 9 NORWICH SALEM RD                   PRICE:
       CITY: EAST HADDAM, CT 06423                   ZONE:
VOL-PAGE  MAP    BLOCK  LOT     ST#   LET      101 HUNTING LODGE RD
664 200   0015   0021   0010    00101          HUNTING LODGE RD

                          *** ASSESSMENTS ***
CODE  QUANT        VALUE     MAJOR CATEGORY:
011     70         48020 RESIDENTIAL
013    100        108010
014    100            70 RESIDENTIAL          OUTBUILDINGS
000
000
000
  TOTAL           156100 EXEMPT            NET:      156100

        *** EXEMPTIONS ***                  LAST YEAR'S GROSS:      156100
    CODE   AMOUNT        CODE   AMOUNT
1ST                  5TH                        *** ELDERLY ***
2ND                  6TH                  FROZEN:            YEAR:
3RD                  7TH                     CB:
4TH                  8TH
```

INQUIRY – ACCESS TO INFORMATION
REAL ESTATE – NEW SYSTEM

```
ASSESSOR SYSTEM 2000 - [Real - 101 HUNTING LODGE LLC]
File  Maintenance  Reports  Housekeeping  Utilities  Windows  Help

Unique ID : 0015 0021      GIS :                 Sequence # : 00      List Num. : 1
    Name : 101 HUNTING LODGE LLC                                      Record Status : ACTIVE
  Care Of :                                                           Billing Status : 9-Billable
 Street 1 : 9 NORWICH SALEM RD                                        Total Acreage: 0.7
 Street 2 :                                                            Ref. Acct. :
    City : EAST HADDAM                                                Census Tract : 0/0        /
   State : CT   Zip : 06423          Phone : (0)0  Ext. : 0           Prop Exempt : No   A-Taxable
 Street Code :                  Street Class :                        % Owned : 0
 Prop Loc. : 101 HUNTING LODGE RD                                    COC # / Delq. : --- / N
Legal Prop Loc.:                                                      Record Date : 02/09/2009
Map/Block/Lot : 0015 0021  0010                                        Sale Price : $0.00
Volume / Page : 664/200          District : 0          Type / NonUse / NonCode : TYPE / NONUSE / NONCODE
   Bank Code :

 Old Code | New Code | Quantity | Assessed Value | Description
 11       | 100      | 0.7      | 48020          | RES LAND
 13       | 100      | 1        | 108010         | RES DWELLING
 14       | 100      | 1        | 70             | RES OUTBUILDING
 0        | 0        | 0        | 0              | None
 0        | 0        | 0        | 0              | None
 0        | 0        | 0        | 0              | None
 0        | 0        | 0        | 0              | None
 0        | 0        | 0        | 0              | None

 Exempt Code | Amount
 0           | 0
 0           | 0
 0           | 0
 0           | 0

 Loc. Des.

 New Gross : $156,100
 Total Exempt : $0
 Net : $156,100

 Type | Year | Hours | Grant/Pr AMT | % Dwn | CB Gross
 Town:
 District:

 Inquiry Year: 2012                    Print        Close [ESC]

 User-Defined
 1:
 2:
```

ACCOUNT INFORMATION

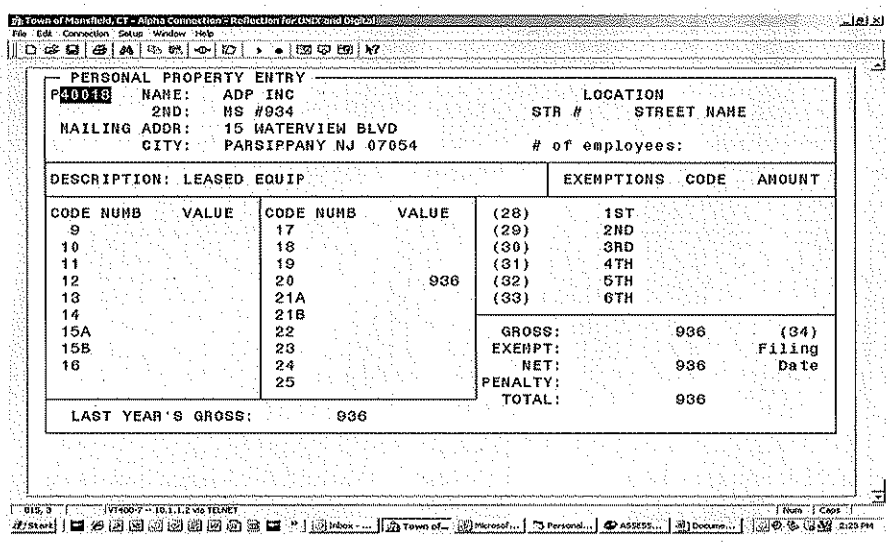
PRINTOUT OPTIONS - OLD

- INQUIRY
- ADD OR MODIFY INFO SCREEN PRINT
- CAN ONLY VIEW CURRENT YEAR'S RECORDS

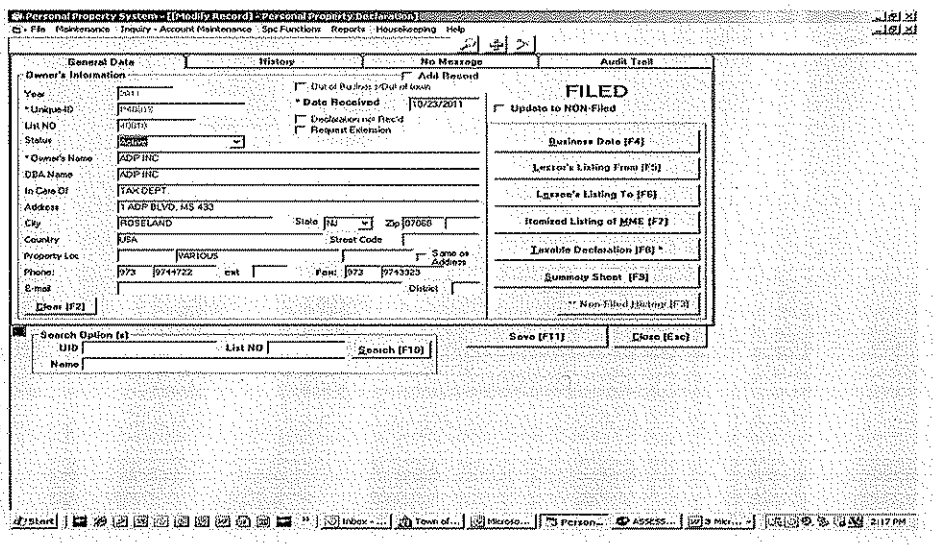
PRINTOUT OPTIONS - NEW

- PRINT INFORMATION NUMEROUS WAYS SUCH AS:
  - SCREEN PRINT
  - DETAILS
  - CAN VIEW & RUN EDIT REPORTS COMPARING CHANGES OVER TIME

INQUIRY - ACCESS TO INFORMATION PERSONAL PROPERTY - OLD SYSTEM



INQUIRY – ACCESS TO INFORMATION PERSONAL PROPERTY - NEW SYSTEM



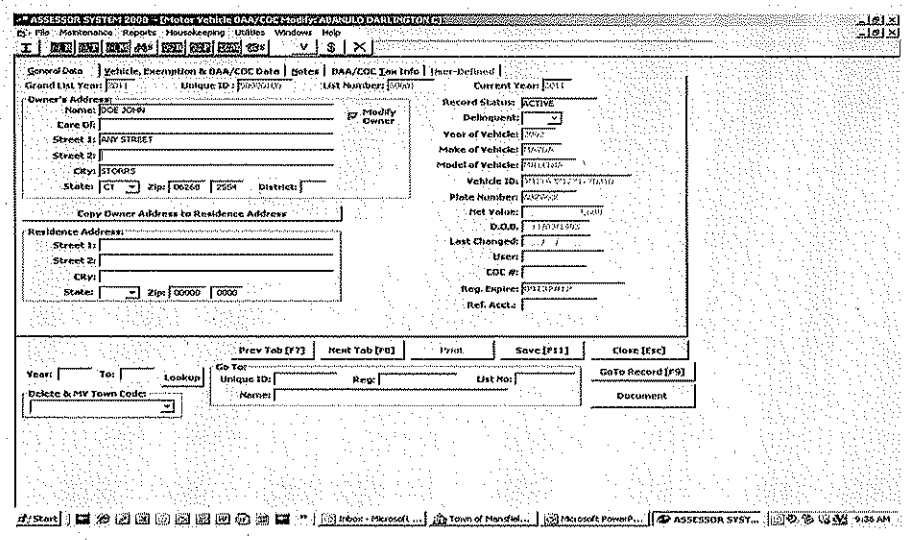
BENEFITS OF PERSONAL PROPERTY SYSTEM

- MASS UPDATES ACCOUNTS FROM ONE YEAR TO NEXT
- AUTOMATICALLY CALCULATES DEPRECIATION & ASSESSMENT
- NONFILING PENALTY AUTOMATICALLY CALCULATED & APPLIED
- ABILITY TO VIEW PRIOR YEAR'S DATA AT A GLANCE
- INACTIVATED ACCOUNTS ARE STILL VIEWABLE
- INCREASE NOTICES GENERATED WITH THE CLICK OF A BUTTON

INQUIRY – ACCESS TO INFORMATION
MOTOR VEHICLES - OLD SYSTEM

```
REGULAR MOTOR VEHICLE

     Acct#: M50001                          Type 'D' to delete:
      Name: DOE JOHN
   2nd Name:
   Address: ANY STREET
   City/St: STORRS                    STATE: CT   ZIP: 06268  2554

Account #: M50001
     Body: 4D SED    Cyl/Axle: 6      Seating:        Standing: 00
  Lt Wght:         Gross Wght:         Tires: P

 Exp Date: 09/13/12      Type: Z       Cycle Code: 1
 % of Assessment: 100    CR %:         Trans date: 08/19/10
  Reason for Adj:                                (O-Oct & -Nov - -Dec)
 Adj Trade-in Value: 3425          Adj Loan Value: 3100
   Manuf Sug Retail: 28025       NADA Return Codes: K

 Street:
   City:                  State:

   TAB 1  TO Primary screen; TAB 2  TO DMV Data; TAB 3  TO CR screen
```

INQUIRY – ACCESS TO INFORMATION
MOTOR VEHICLES – NEW SYSTEM



BENEFITS OF MOTOR VEHICLE SYSTEM

- EXEMPTIONS ARE APPLIED FROM ONE YEAR TO THE NEXT WITH A CLICK OF THE BUTTON
- DUPLICATE VIN REPORT FLAGS PLATE ONLY CHANGES
- ADDS FROM OTHER TOWNS CAN BE IMPORTED ELECTRONICALLY – NO NEED TO DATA ENTER EACH RECORD MANUALLY
- RECORDS BELONGING TO OTHER TOWNS CAN BE EXPORTED MANUALLY OR ELECTRONICALLY

OTHER FUNCTIONALITY GAINED

OLD SYSTEM

- REPORTS WERE GENERATED BY FOLLOWING A SERIES OF COMMANDS ON TYPEWRITTEN INSTRUCTIONS
- NO WARNING OF POSSIBLE ERRORS
- PRIOR INFORMATION WAS LOST IF OVER-WRITTEN ON THE ADMINS SCREEN

NEW SYSTEM

- EDIT REPORTS WITH A CLICK OF THE BUTTON
- SYSTEM SELF-CHECKS FOR DISCREPANCIES AND FLAGS QUESTIONABLE DATA
- LETS YOU KNOW IF YOU'RE DOING SOMETHING "ODD"
- ALLOWS USER TO RESTORE DATA IF A MISTAKE IS MADE

OTHER FUNCTIONALITY GAINED (CON'T.)

OLD SYSTEM

- MESSAGES – DID NOT EXIST
- UNABLE TO VIEW TAX INFO
- UNABLE TO VIEW PREVIOUSLY MADE ADJUSTMENTS

NEW SYSTEM

- MESSAGES CAN BE STORED TO KEEP TRACK OF EXCEPTIONAL SITUATIONS
- ASSESSOR'S SIDE CAN VIEW TAX INFO
- VIEW PREVIOUSLY MADE ADJUSTMENTS
- AVOID DUPLICATION OF PROCESSES

ADDITIONAL BENEFITS

MANAGE STATE AND LOCAL PROGRAMS SUCH AS ELDERLY/DISABLED HOMEOWNERS, FREEZE AND ADDITIONAL VETERANS

- APPLICATIONS ARE MAINTAINED AND PROCESSED ON THE ASSESSOR'S SIDE
- INFORMATION AUTOMATICALLY TRANSFERRED TO REVENUE COLLECTOR
- NOTIFIES ASSESSOR IF APPLICANT'S PROPERTY SELLS OR TRANSFERS

ADDITIONAL BENEFITS (CON'T.)

ONE VENDOR TO SUPPORT ASSESSMENT ADMINISTRATION AND REVENUE COLLECTION

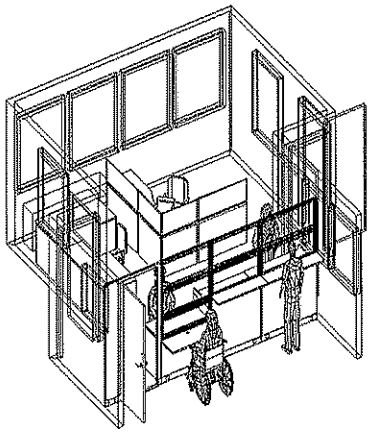
- TAXPAYER INFORMATION CAN BE RETRIEVED BY EITHER DEPARTMENT AND CALLS CAN BE TRANSFERRED TO THE APPROPRIATE OFFICE QUICKLY AND EFFICIENTLY

- REPORTS CAN BE GENERATED FOR USE BY OTHER DEPARTMENTS OR THE PUBLIC IN EXCEL FORMAT

CUSTOMER COUNTER

RECEPTION STATION REDESIGN

- LOWER COUNTERS
- WHEELCHAIR ACCESS
- KIOSK
- GLASS



NEW COUNTER IMPROVEMENTS

IMPROVEMENT IN OUR ADA COMPLIANCE AND REQUESTS MADE BY CUSTOMERS

- ✓ LOWER COUNTERS
  - ✓ EASIER FOR CHECK WRITING,
  - ✓ A LOWER DESK LEVEL COUNTER FOR WHEEL CHAIR ACCESS FROM SIDE APPROACH
  - ✓ SEMI-PRIVATE CONVERSATIONS WITH COLLECTOR
- ✓ KIOSK
  - ✓ TITLE SEARCHERS AND ATTORNEYS COULD SELF HELP WITH LITTLE INSTRUCTION
  - ✓ CUSTOMERS CAN LOOK UP AND PAY WITH DEBIT AND CREDIT.
- ✓ GLASS AND TALLER SECURITY DOOR
  - ✓ MITIGATES RISK TO PERSONNEL AND SAFEGUARDS ASSETS