

STATE TAX DEPARTMENT

PROPERTY TAX DIVISION

TAX YEAR 2008

COUNTY MONITORING PLAN

WEST VIRGINIA DEPARTMENT OF TAX AND REVENUE

TAX YEAR 2008

COUNTY MONITORING PLAN

- I. All assessors will be mailed a copy of the monitoring plan complete with all forms and the Monitoring Questionnaire (Exhibit 1) to be used by the Property Tax Division appraiser/monitor.**
- II. The Property Tax Division of the Department of Tax and Revenue will evaluate all fifty-five counties between February 19, 2008 and July 1, 2008.**
- III. The assessor will be notified either by phone or by mail approximately one week prior to the visit by the appraiser/monitor.**
- IV. The monitor will discuss with the assessor the purpose of the visit, the monitoring process, and how the assessor feels he is proceeding in accordance with his plan.**
 - A. The Property Tax Division will monitor one-third of 55 counties each year on a three-year cycle beginning TY2008.**
 1. A review of the mapping and drafting products will be made to determine if they are in accordance with mapping and drafting procedures adopted by the Property Valuation Training and Procedures Commission (Mapping and Drafting Review Form, Exhibit 2). A minimum sample of six (6) parcels will be selected at random for the purpose of the review.
 2. A randomly selected sample of six (6) split transfers, of the previous 12 months, will be reviewed to determine if they have been mapped. A randomly selected sample of six (6) splits transfers, of the previous 24 months) will be reviewed to determine if they have been neat drafted. The objective of this sampling is to determine the current status of map maintenance and neat drafting (Exhibit 2).
 - B. Real Property**
 1. A ten (10) parcel minimum sample will be selected at random for each appraiser/data collector whose work has not been monitored previously or whose work was previously found to be unacceptable or at the discretion of the monitor. A Real Property Listing Quality Check Form (Exhibit 3) will be completed for each appraiser monitored. Should the above not apply in the county, a minimum sample of ten (10) parcels

will be reviewed. This sampling will be composed of residential, farm and commercial parcels. An error rate of 10% or less in the total appraised value is acceptable. An error rate of 10% or less on all parcels reviewed is acceptable.

2. A review will be made of completed commercial, residential and farm valuation land tables along with the support documents showing their development. Copies of the support documentation showing either the changes or the documentation indicating that the current land tables are market value will be included in final work papers.
3. A review will be made of the neighborhood forms/maps or listings created along with their support documentation. This review will help determine if the county can properly identify where their neighborhoods are located. If the county does not have maps or listings for their neighborhood, the monitor should request a neighborhood listing for the county.
4. A review will be made of the residential and commercial cost modifiers along with the support documentation showing their development. A copy of the support documentation will be included in final work papers.
5. A review will be made of randomly selected sales/transfers during the past 12 months for determination of proper entry (all sales of \$100 or more) and correct validation on the CAMA system. The buyer, seller or agents will be contacted to assure the correct validation coding of the sale (Exhibit 4). Also a review will be made of the county's sales verification methodology. The number of sales sampled will be based on the county's parcel size. For counties less than 10,000 parcels a minimum of 10, for counties 10,000 to 30,000 a minimum of 30, for counties 30,000 to 50,000 a minimum of 40 and more than 50,000 a minimum of 50. The monitor must review the minimum required for the county. An error rate of 10% or less is acceptable.
6. A review will be made of valid sales from the most current sales ratio analysis. For tax year 2008, sales will be selected by the monitor from residential neighborhoods only. This review will be made by comparing the equalization of the sale parcel as it relates to prior years values/listings and comparable properties located in the same neighborhood. (Exhibit 5) A minimum of 3 comparable properties per sale will be reviewed. The monitor will make a determination of whether sales are being manipulated for the sales ratio analysis. An error rate of

10% or less is acceptable. A minimum of ten valid sales per county is to be reviewed.

C. Personal Property

1. If the county has chosen to physically appraise commercial personal property, an on-site review will be made of three (3) randomly selected commercial businesses, per appraiser. The Personal Property Listing Quality Check Form (Exhibit 5) will be completed for each appraiser. An error rate of 10% of the total appraised value is acceptable.
2. If the county has chosen to use the property return method for valuing personal property, a review will be completed of a randomly selected sample of five (5) individual returns and an on-site review of five (5) businesses to determine if the return valuation process is acceptable. This review will include at least two non-filers, to assure that the value estimates are producing adequate results. An error rate of 10% or less of the total appraised value is acceptable (Exhibit 6).
3. A review will be made to determine if the assessor is using the IAS system and the correct NAICS code, trend and depreciation schedules to uniformly value business personal property as required by West Virginia Code, § 11-1C-7(a).
4. The review of the sample of five (5) individual returns will include a review of the valuation of vehicles to determine if they are valued based on the schedule of used vehicle values as compiled by the state tax commissioner.
5. A review will be made of at least one new vehicle dealer and one used vehicle dealer return to assure that the vehicle inventory form is being properly filed with the assessor as provided in West Virginia Code, § 11-6C-1 et seq.

D. Natural Resource Property

1. A review will be made to determine if the county has linked all natural resource appraisals to the appropriate real or personal property account on the assessment or CAPP system.
2. A review will be made to determine if the managed timberland is valued at the same value or lesser value than comparable woodland properties as required by Legislative Regulations Title 110, Series 1H, 2.2.

- E. **Data Entry** - A general procedural review of the data entry will be made. An error rate of 10% or less is acceptable.
1. **Real Property** - A review of five (5) randomly selected PF-12's will be compared to corresponding field source documents (Exhibit 6).
 2. **Personal Property** - A review of five (5) randomly selected returns will be compared to the corresponding CAPP records (Exhibit 7).
- F. **Appraisal Status** - A review will be made of the progress of the appraisal as compared to the timetable in the county valuation plan.
- V. **Appraisal Evaluation** - Ratio studies will be reviewed with the county to monitor their appraisal and assessment performance.

An appraisal/sales ratio study will be conducted to determine if the aggregate ratios or the medians, and the Coefficients of Dispersion (COD) about the median, for residential, commercial and industrial property meet the following standards.

TAX YEAR 2007 APPRAISAL STANDARDS

PROPERTY TYPE	AGG. RATIO OR MEDIAN	COD	MANN-WHITNEY ADVISORY ONLY	PRD ADVISORY ONLY
Residential Improved	± 10%	< 15	-1.96 to 1.96	.98 to 1.03
Commercial All	± 10%	< 20	-1.96 to 1.96	.98 to 1.03
All Property Less F & T	± 10%	< 20	-1.96 to 1.96	.98 to 1.03

Aggregate Ratio or Median:

Appraisals and assessed values must be within ± 10% of 100% of market value for appraisals and 60% of market value for assessed values.

Coefficient of Dispersion about the Median (COD):

The COD should not be greater than 15 for residential improved property and should not be greater than 20 for all other property types.

Mann-Whitney Test Results: (Advisory Only)

The z-value must be between -1.96 and +1.96 for all property types. If the z-value is below -1.96, unsold property is appraised and assessed higher than sold property. If the z-value is greater than +1.96, sold property is appraised and assessed higher than unsold property.

Price Related Differential (PRD): (Advisory Only)

The PRD must be between .98 and 1.03. If the PRD is below .98, higher priced properties are overvalued compared to lower priced properties. If the PRD is above 1.03, lower priced properties are overvalued compared to higher priced properties.

VI. Appraisal Progress Report - The Property Tax Division monitor will prepare a report based on the monitoring activities. A written narrative will accompany the working papers. It will summarize the salient points of the findings including the areas of discrepancies and their remedial courses and suggestions on solving the discrepancies.

- A. The report will be reviewed with the county assessor by the area appraisal supervisor or the monitor. A copy of the written narrative will be given to the assessor.**
- B. The report will be reviewed by the State Tax Commissioner and the Director of the Property Tax Division.**
- C. The assessor will have the opportunity to file his/her report of explanation or rebuttal to the "PVTPC" and the State Tax Department if a disagreement exists.**
- D. The report will be submitted to the "PVTPC" and once approved, it will become public information.**

MONITORING QUESTIONNAIRE - TAX YEAR 2008

I.	MAPPING	YES	NO	N/A	COMMENTS OR W/P REFERENCE
	A. Has the county followed the mapping guidelines adopted by the "PVTPC?"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	B. Is the map maintenance current?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
II.	DRAFTING				
	A. Has the county followed the drafting guidelines adopted by the "PVTPC?"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	B. Is the drafting current?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
III.	REAL ESTATE APPRAISALS				
	A. Are the data collectors and or appraisers following the visitation guidelines as established by the "PVTPC?"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	B. Is the quality of the data collection acceptable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	C. Are notices being left at owner occupied properties when no one is home?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	D. Have the individuals received the proper training in data collection procedures?				
	1. Residential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	2. Commercial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	E. Has the county performed an in-house quality check of their data collector/appraisers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	F. Are production logs kept for data collectors and appraisers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	YES	NO	N/A	COMMENTS OR W/P REFERENCE
G. Has a current county cost modifier and neighborhood modifier been developed for:				
1. Residential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Commercial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
H. Have the land tables been completed along with support documentation?				
1. Residential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Farm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Commercial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
I. Does county have current neighborhood maps or listings?				
1. Residential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Commercial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
J. Has the assessor correctly coded sales upon the CAMA system?				
1. Has the assessor entered all sales in excess of \$100 or more?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Has the assessor applied the proper validation codes on all sales entered on the CAMA system?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
K. To achieve market value has the Assessor adjusted:				
1. All parcels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Sale parcels only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

		YES	NO	N/A	COMMENTS OR W/P REFERENCE
VI.	GENERAL				
	C. Is the overall appraised to Sales Ratio Report evaluation acceptable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	A. Have all assessor's personnel hired with monies from the valuation fund been approved by the "PVTPC" prior to hiring?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	B. Have all personnel in the assessor's office whose responsibility is to place values on property successfully completed the Basic Training Course?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	C. How many personnel does the assessor have on his/her staff (both temporary and permanent) whose primary responsibility is:				
	1. Real Estate	<u>Full</u>	<u>Part</u>	<u>Temp</u>	
	2. Personal Property				
	3. Other				
	4. Total				

TAX MAPPING/DRAFTING QUALITY INSPECTION

COUNTY _____

DATE OF INSPECTION _____

NAME AND TITLE OF INSPECTOR _____

PERSON/FIRM PERFORMING TAX MAPPING _____

PERSON/FIRM PERFORMING DRAFTING _____

1. Date to which work maps are current: _____

2. Date to which master maps are current: _____

3. Is there a complete set of work copies? YES NO

4. Does the work on the maps generally follow the uniform state wide mapping procedures? YES NO

5. Does the drafting on the master maps conform to the existing maps and statewide drafting procedures? YES NO

6. Has the person or firm's employees who are performing the tax mapping/drafting received adequate training? YES NO

(1)

II. SAMPLE SPLIT TRANSFERS INSPECTED

DISTRICT NAME	MAP NO.	PARCEL NO.
COMMENTS:		

(2)

SAMPLE SPLIT TRANSFERS INSPECTED

DISTRICT NAME	MAP NO.	PARCEL NO.
COMMENTS:		

(3)

SAMPLE SPLIT TRANSFERS INSPECTED

DISTRICT NAME	MAP NO.	PARCEL NO.
COMMENTS:		

(4)

SAMPLE SPLIT TRANSFERS INSPECTED

DISTRICT NAME	MAP NO.	PARCEL NO.
COMMENTS:		

(5)

SAMPLE SPLIT TRANSFERS INSPECTED

DISTRICT NAME	MAP NO.	PARCEL NO.
COMMENTS:		

(6)

SAMPLE SPLIT TRANSFERS INSPECTED

DISTRICT NAME	MAP NO.	PARCEL NO.
COMMENTS:		

DATA COLLECTOR/APPRaiser

FIELD MONITOR

COUNTY

DATE OF QUALITY CHECK

OWNER CONTACTED BY FIELD MONITOR

REINSPECT AND REMEASURE

NO. 1

PARCEL I.D.

OWNERS NAME

PROPERTY ADDRESS:

CITY

STATE

ZIP CODE

EVALUATION	YES	NO	OWNERS COMMENTS:
Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>	SPECIFIC NOTES:
Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>	
Courteous, Considerate	<input type="checkbox"/>	<input type="checkbox"/>	
Business Approach	<input type="checkbox"/>	<input type="checkbox"/>	
Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>	
All Data Requested (I.e. rents, sales, tax class, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	
Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>	
Property Data Accurate	<input type="checkbox"/>	<input type="checkbox"/>	
Grade: 0 - 100%			

NO. 2

PARCEL I.D.

OWNERS NAME

PROPERTY ADDRESS:

CITY

STATE

ZIP CODE

EVALUATION	YES	NO	OWNERS COMMENTS:
Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>	SPECIFIC NOTES:
Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>	
Courteous, Considerate	<input type="checkbox"/>	<input type="checkbox"/>	
Business Approach	<input type="checkbox"/>	<input type="checkbox"/>	
Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>	
All Data Requested (I.e. rents, sales, tax class, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	
Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>	
Property Data Accurate	<input type="checkbox"/>	<input type="checkbox"/>	
Grade: 0 - 100%			

NO. 3

PARCEL I.D.

OWNERS NAME

PROPERTY ADDRESS:

CITY

STATE

ZIP CODE

EVALUATION	YES	NO	OWNERS COMMENTS:
Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>	SPECIFIC NOTES:
Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>	
Courteous, Considerate	<input type="checkbox"/>	<input type="checkbox"/>	
Business Approach	<input type="checkbox"/>	<input type="checkbox"/>	
Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>	
All Data Requested (I.e. rents, sales, tax class, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	
Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>	
Property Data Accurate	<input type="checkbox"/>	<input type="checkbox"/>	
Grade: 0 - 100%			

PART II. VISUAL INSPECTION RESULTS

1. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

2. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

3. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

4. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

5. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

6. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

7. PARCEL _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

SPECIFIC COMMENTS: _____

SALES ENTRY AND VALIDITY REVIEW

County _____ Monitor/Appraiser _____ Date _____
 Sale: District _____ Map _____ Parcel (s) _____
 Current Validity Code _____ Sale Price _____
 Has the sale (s) been keyed to CAMA? YES NO
 If no, why was the sale not keyed? _____
 Contact: _____
 A. If yes, is the validation code correct? YES NO
 B. If no, what is the proper validation code and why?

SALES ENTRY AND VALIDITY REVIEW

County _____ Monitor/Appraiser _____ Date _____
 Sale: District _____ Map _____ Parcel (s) _____
 Current Validity Code _____ Sale Price _____
 Has the sale (s) been keyed to CAMA? YES NO
 If no, why was the sale not keyed? _____
 Contact: _____
 A. If yes, is the validation code correct? YES NO
 B. If no, what is the proper validation code and why?

SALES ENTRY AND VALIDITY REVIEW

County _____ Monitor/Appraiser _____ Date _____
 Sale: District _____ Map _____ Parcel (s) _____
 Current Validity Code _____ Sale Price _____
 Has the sale (s) been keyed to CAMA? YES NO
 If no, why was the sale not keyed? _____
 Contact: _____
 A. If yes, is the validation code correct? YES NO
 B. If no, what is the proper validation code and why?

VALID SALE REVIEW
SUBJECT PROPERTY VALUATION

Parcel #: _____
 Sale Price: _____
 Sale Date: _____

Current CAMA Value: _____

Change:

- Grade
- CDU
- Remodeling
- Other
- No Change

Prior CAMA value: _____

Reason for change: _____

Overrides: Land Rate
 Land Influence
 Gross Value Land

Gross Value Bldg.
 Cost & Design
 Other

Comments/Errors: _____

EQUALIZATION

Appraiser will inspect three parcels within same neighborhood for comparability.

	MARKET VALUE	CAMA APPRAISAL
Parcel 1 _____	<input type="checkbox"/> Similar to subject <input type="checkbox"/> Somewhat greater than subject <input type="checkbox"/> Somewhat less than subject	<input type="checkbox"/> Similar to subject <input type="checkbox"/> Somewhat greater than subject <input type="checkbox"/> Somewhat less than subject

Comments/Errors: _____

	MARKET VALUE	CAMA APPRAISAL
Parcel 1 _____	<input type="checkbox"/> Similar to subject <input type="checkbox"/> Somewhat greater than subject <input type="checkbox"/> Somewhat less than subject	<input type="checkbox"/> Similar to subject <input type="checkbox"/> Somewhat greater than subject <input type="checkbox"/> Somewhat less than subject

Comments/Errors: _____

	MARKET VALUE	CAMA APPRAISAL
Parcel 1 _____	<input type="checkbox"/> Similar to subject <input type="checkbox"/> Somewhat greater than subject <input type="checkbox"/> Somewhat less than subject	<input type="checkbox"/> Similar to subject <input type="checkbox"/> Somewhat greater than subject <input type="checkbox"/> Somewhat less than subject

Comments/Errors: _____

Review results indicate county is:

- Achieving market value
- Moving toward market value
- Moving away from market

Comments: _____

PERSONAL PROPERTY LISTING QUALITY CHECK

EXHIBIT 6

APPRaiser	FIELD MONITOR
COUNTY	DATE OF QUALITY CHECK
OWNER CONTACTED BY FIELD MONITOR	REINSPECT AND REMEASURE

NO. 1 _____ OWNERS NAME _____ ACCOUNT # _____

PROPERTY ADDRESS:		CITY	STATE	ZIPCODE																											
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:30%;">EVALUATION</th> <th style="width:10%; text-align: center;">YES</th> <th style="width:10%; text-align: center;">NO</th> </tr> </thead> <tbody> <tr><td>Properly Identify Himself</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Occupant Understood</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Courteours, Considerate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Business Approach</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Inspection Thorough</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>All Data Requested (i.e. leased equip., consignments, etc.)</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Listing Accurate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Measurements Accurate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> </tbody> </table>	EVALUATION	YES	NO	Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>	Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>	Courteours, Considerate	<input type="checkbox"/>	<input type="checkbox"/>	Business Approach	<input type="checkbox"/>	<input type="checkbox"/>	Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>	All Data Requested (i.e. leased equip., consignments, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	Listing Accurate	<input type="checkbox"/>	<input type="checkbox"/>	Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>				OWNERS COMMENTS: SPECIFIC NOTES:
EVALUATION	YES	NO																													
Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>																													
Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>																													
Courteours, Considerate	<input type="checkbox"/>	<input type="checkbox"/>																													
Business Approach	<input type="checkbox"/>	<input type="checkbox"/>																													
Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>																													
All Data Requested (i.e. leased equip., consignments, etc.)	<input type="checkbox"/>	<input type="checkbox"/>																													
Listing Accurate	<input type="checkbox"/>	<input type="checkbox"/>																													
Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>																													

NO. 2 _____ OWNERS NAME _____ ACCOUNT # _____

PROPERTY ADDRESS:		CITY	STATE	ZIPCODE																											
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:30%;">EVALUATION</th> <th style="width:10%; text-align: center;">YES</th> <th style="width:10%; text-align: center;">NO</th> </tr> </thead> <tbody> <tr><td>Properly Identify Himself</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Occupant Understood</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Courteours, Considerate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Business Approach</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Inspection Thorough</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>All Data Requested (i.e. leased equip., consignments, ect.)</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Listing Accurate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Measurements Acurate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> </tbody> </table>	EVALUATION	YES	NO	Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>	Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>	Courteours, Considerate	<input type="checkbox"/>	<input type="checkbox"/>	Business Approach	<input type="checkbox"/>	<input type="checkbox"/>	Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>	All Data Requested (i.e. leased equip., consignments, ect.)	<input type="checkbox"/>	<input type="checkbox"/>	Listing Accurate	<input type="checkbox"/>	<input type="checkbox"/>	Measurements Acurate	<input type="checkbox"/>	<input type="checkbox"/>				OWNERS COMMENTS: SPECIFIC NOTES:
EVALUATION	YES	NO																													
Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>																													
Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>																													
Courteours, Considerate	<input type="checkbox"/>	<input type="checkbox"/>																													
Business Approach	<input type="checkbox"/>	<input type="checkbox"/>																													
Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>																													
All Data Requested (i.e. leased equip., consignments, ect.)	<input type="checkbox"/>	<input type="checkbox"/>																													
Listing Accurate	<input type="checkbox"/>	<input type="checkbox"/>																													
Measurements Acurate	<input type="checkbox"/>	<input type="checkbox"/>																													

NO. 3 _____ OWNERS NAME _____ ACCOUNT # _____

PROPERTY ADDRESS:		CITY	STATE	ZIPCODE																											
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:30%;">EVALUATION</th> <th style="width:10%; text-align: center;">YES</th> <th style="width:10%; text-align: center;">NO</th> </tr> </thead> <tbody> <tr><td>Properly Identify Himself</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Occupant Understood</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Courteours, Considerate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Business Approach</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Inspection Thorough</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>All Data Requested (i.e. leased equip., consignments, etc.)</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Listing Accurate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> <tr><td>Measurements Accurate</td><td align="center"><input type="checkbox"/></td><td align="center"><input type="checkbox"/></td></tr> </tbody> </table>	EVALUATION	YES	NO	Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>	Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>	Courteours, Considerate	<input type="checkbox"/>	<input type="checkbox"/>	Business Approach	<input type="checkbox"/>	<input type="checkbox"/>	Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>	All Data Requested (i.e. leased equip., consignments, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	Listing Accurate	<input type="checkbox"/>	<input type="checkbox"/>	Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>				OWNERS COMMENTS: SPECIFIC NOTES:
EVALUATION	YES	NO																													
Properly Identify Himself	<input type="checkbox"/>	<input type="checkbox"/>																													
Occupant Understood	<input type="checkbox"/>	<input type="checkbox"/>																													
Courteours, Considerate	<input type="checkbox"/>	<input type="checkbox"/>																													
Business Approach	<input type="checkbox"/>	<input type="checkbox"/>																													
Inspection Thorough	<input type="checkbox"/>	<input type="checkbox"/>																													
All Data Requested (i.e. leased equip., consignments, etc.)	<input type="checkbox"/>	<input type="checkbox"/>																													
Listing Accurate	<input type="checkbox"/>	<input type="checkbox"/>																													
Measurements Accurate	<input type="checkbox"/>	<input type="checkbox"/>																													

PART II. PROPERTY RETURNS

1. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

2. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

3. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

4. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

5. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

6. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

7. ACCOUNT # _____ GOOD (NO ERRORS) ACCEPTABLE NOT ACCEPTABLE

OWNERS NAME _____

SPECIFIC COMMENTS: _____

DATA ENTRY QUALITY CHECK

COUNTY

APPRAISER/MONITOR

PART I. REAL ESTATE

1. PARCEL NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

2. PARCEL NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

3. PARCEL NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

4. PARCEL NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

5. PARCEL NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

6. PARCEL NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

DATA ENTRY QUALITY CHECK

COUNTY

APPRAISER/MONITOR

PART II. PERSONAL PROPERTY

1. ACCOUNT NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

2. ACCOUNT NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

3. ACCOUNT NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

4. ACCOUNT NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

5. ACCOUNT NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

6. ACCOUNT NO. _____ GOOD ACCEPTABLE NOT ACCEPTABLE
COMMENTS: _____

**Exit Conference
TY08**

(Date)

(County)

Monitoring Summary

	Satisfactory (√)	Unsatisfactory (√)
Mapping	_____	_____
Drafting	_____	_____
Real Estate		
Quality (Data Collection)	_____	_____
Procedures (Land Tables/Modifiers)	_____	_____
Sales (Transfer Slips)	_____	_____
Appraisal Uniformity (Three Comp)	_____	_____
On-Schedule (Three Year Plan)	_____	_____
Appraisal Evaluation (Sales Ratio)	_____	_____

Comments: _____

Assessor's Signature

Monitor's Signature