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Welcome to Engage™; citizen engagement portal!

The term “citizen engagement” is not new, but the way that citizens Engage with local governmental agencies has changed tremendously in recent years.

A modern approach to citizen engagement suggests that some citizens appreciate the ability to interact with their local government in a digital environment, such as online access to services to; pay property taxes, research publicly available information, submit documents and forms, etc. That’s where Engage™ comes in!

Engage™ is an online resource where citizens, real estate professionals, businesses, etc. can access all kinds of publicly available information related to property, such as; owner name, assessed value, neighborhood amenities, improvement information, property taxes, property record cards, interactive forms, and so much more!

As a core product for XSoft™, Engage™ has been designed to take advantage of dynamic integration to XSoft’s™ other core products, INcama™ and INtax™, which are used by local government agencies for property tax assessment, billing, collection, and distribution purposes. This dynamic integration means that the data you’re viewing in Engage™ is as current and up to date as possible.

Engage™ is intended to be an intuitive, user-friendly application. However, we know that some features of Engage™ could use a bit of guidance to be completely beneficial to you. That’s the purpose for this user guide – to help you be a little more productive as you use Engage™.

Be sure to keep an eye out for the TIP text in red throughout this document – it’ll provide you some helpful hints.

To learn more about XSoft™, please visit us at; www.xsoftinc.com
Navigate

There are 3 pages on the website that allow you to navigate through data, they are:

- Primary page
- Map page
- Property Data page

Primary page

When you first enter the Engage™ website, you’ll land on the Primary page (shown below):

On the Primary page, you can navigate to other pages, such as; Map, Property Data, Contact, etc. by selecting the tab on the top menu bar. Or, if you just want to search for a name or address, you can simply enter that information into the search box, press (or ), and let Engage™ do the rest!

TIP: As you use Engage™, keep your eye out for carats (aka arrows or chevrons). Carats expand / collapse windows to show / hide detailed information. For example, the carat at the bottom of the Primary page expands the page to show more information about the county.
Map page

The Map page provides a variety of tools you can use to search, measure, print, zoom, etc.

1. Search
2. Measure
3. Print
4. Zoom in/out
5. Layer control

Search

Just like searching on the Primary page, you can search on the Map page. Simply enter information (name, address, parcel number) into the search box, press (or ), and let Engage™ do the rest!

Measure

With Engage™, you can measure between points (2 or more) or you can measure an area. To measure between points, select the “measure line” icon: . To measure an area, select the “measure area” icon: .
**TIP:** The default unit for line measurement is set to “feet” and for area measurements it’s set to “acres”. After you finish measuring, you can change the unit by selecting the Unit pulldown:

Print

The `Print` button allows you to print detailed information about a property, including the map and parcel characteristics. Printing is automatically formatted to fit 8 ½ x 11 paper. However, through the print settings, you can select other paper sizes depending on the capabilities of your printer.

**TIP:** You must select a specific parcel before the “Print” button becomes active.

Zoom in/out

The zoom in/out tools, +−, incrementally adjust the scale of the map. The “+” button zooms in and the “−” button zooms out.

**TIP:** If you’re using a mouse with a scroll wheel, you can dynamically zoom in/out with the mouse wheel.

**BONUS TIP:** You can define the area to zoom into. If you hold the “Shift” key, click the left mouse button to drag a box defining where you want to zoom. When you release the left mouse button, the map will zoom into the area you’ve defined.

Also, you can scroll using the mouse. Click and hold the left mouse button on the map and drag the map left/right/up/down. Release the left mouse button when you’re done scrolling.

**BONUS TIP:** You can rotate the map. Click and hold the right mouse button on the map and rotate the map 360 around the point where you’ve clicked. Release the right mouse button when you’re done rotating the map. To reset the map with North at the top of the map, select the compass icon 🌋.

Layer control

As a focused application, Engage™ has been designed to be very specific to the property tax and assessment industry. Because of this, we’ve simplified the layer control to include only two options to use as a basemap; streets or imagery. Regardless of the basemap you select, once you’ve zoomed into a predefined map scale, the county’s parcel boundary map will overlay on top of the basemap you’ve selected.
Property Data page

The Property Data page provides a variety of tools to search, view, and sort the information:

1. Search
2. View
3. Sort
4. Action Center

Search

Like searching on the Primary page, you can search on the Property Data page. Simply enter information (name, address, parcel number) into the search box. Once you’ve entered information, press “Enter” on your keyboard and let Engage™ do the rest!

**TIP:** Although the default is to show 25 results per page, you can choose to display up to 75 results per page via the pulldown in the upper right corner of the Property Data page.

View

Once you’ve completed your search you can view all results on the Map page by selecting the View This Page On Map button.

Sort

The results of your search will automatically be sorted by Property ID from the highest to the lowest number. You can re-sort the results of any data category by selecting the button.
Action Center

The **Action Center** is the hub of the Property Data page, providing a series of “actions” you can perform for the selected parcel(s), such as:

- **Appeal.** Although not available on all Engage websites, the Appeal button allows the user to file an online property tax assessment appeal. Because property tax assessment appeals can only be filed during certain times of the year, the icon may appear to be “ghosted”, like 🕒 this which means the Appeal deadline has passed. More information about online Appeals can be found in the Cool Stuff section of this document, beginning on p. 24.

- **Pay.** Although not available on all Engage websites, the Pay button allows the user to pay property taxes using a credit card. More information about paying property taxes online can be found in the Taxes section of this document, beginning on p. 20.

- **Homestead.** Although not available on all Engage websites, the Homestead button allows the user to file an online Homestead Property Tax Standard / Supplemental Deduction. More information about interactive forms can be found in the Cool Stuff section of this document, beginning on p. 24.

- **Map.** The Map button takes the user directly to the selected property on the Map page.

- **Detail.** If you’d like more information about a particular search result, click on the Detail button and you’ll be redirected to a detailed parcel report, which contains Parcel ID information, neighborhood amenities, owner/transfer history, sales information, valuation history, land record information, the property sketch, property photos, and improvement information.

**TIP:** When viewing the Detailed Parcel Report, you can print the report by using the right mouse button and selecting Print (or Ctrl + P). From the print dialogue box, you can configure page settings, such as paper size, margins, print quality, etc.
Search

Chances are, you’ve come to the Engage™ website because you’re searching for property assessment or tax information. So, how do you find what you’re looking for? You can use a map to locate the property, or you can enter information into the search box and let Engage™ do the heavy lifting for you. If you use the search tool, you have two options; basic search and advanced search.

Basic search

You can access the basic search from a variety of places in Engage™; the Primary page, the Map page, and the Property Data page. While the basic search tool is meant to be simple to use, behind the scenes, Engage™ is working hard to provide you the results you’re searching for. For this reason, you should try to be as specific as possible to get the results you’re looking for (e.g. if you’re searching for John Smith, you’ll likely get numerous results if you only enter “Smith” in the basic search). If you’re not specific with your search criteria, Engage™ will still attempt to narrow down the search results for you, however, the results list may be a bit larger than you’d like.

Are you looking for a street address? Just like searching for a name, the more specific you are, the more Engage™ will be able to narrow down the search results (e.g. if you’re specifically looking for 123 Main Street, you’ll likely get numerous results if you just enter “123” in the basic search).

Advanced search

Not everyone is searching for simple stuff, like John Smith or 123 Main Street. Sometimes you might be looking for more complex information, such as:

All the 3-bedroom homes sold between December 1, 2019 and December 31, 2019 with an assessed value between $150,000 and $160,000.

Engage™ has the advanced searching tools you need for this type of complex search! Look below the basic search bar on the Primary page and you’ll find the “Advanced Search” link:
Advanced Search... takes you to the following page:

Selecting the “+” symbol on any search criteria item expands the search criteria, allowing you to enter the specific criteria; between certain dates, between certain values, or a specific number, like the number of bedrooms. Once you’ve entered in the search criteria you’re looking for, hit the Search button and Engage™ will do the rest.

TIP: After you complete either a Basic or Advanced Search, Engage™ will display the results and location on a map. These results are limited to a maximum of 25 results. More than this and it might become visually difficult to see on a map. If your search results exceed 25 results, you may want to consider viewing the information on the Property Data page. Don’t worry, you don’t have to redo your search, if you scroll down on the results on the Map page, there’s a link to take you directly to the search results on the Property Data page.

BONUS TIP: There’s no need to fill out every search criteria option. With Advanced Search, if you want, you can fill in only one search criteria, such as Sale Price.
Select

Let’s assume you’ve come to the Engage™ website to search for property assessment or tax information and you want to use the map to “select” a certain parcel or maybe a group of parcels. So, how can you do this? Well, you’ve come to the right place because Engage™ allows you to select one or many parcels, using some simple tools.

Select a single parcel

First, make sure you’ve located the property by zooming into the map until the parcel layer is visible, like below. Then, click the left mouse button once on the property. Engage™ will highlight the parcel boundary light blue and then display the property information for the highlighted parcel:
Select a group of parcels within a radius

What if you’re searching for a group of parcels within a certain radius of your property? First, just like selecting a single parcel described above, you’ll want to make sure you’ve zoomed into the map until the parcel layer is visible, like below. Then, use the “select by circle” tool and your results will be highlighted on the map:
Select a group of parcels within a boundary

What if you’re interested in a group of parcels within a certain, irregular shaped boundary of your property? After you’ve zoomed into the map until the parcel layer is visible, use the “select by polygon” tool and your results will be highlighted on the map, like below:
After you’ve selected a parcel, or group of parcels, you can view more information about your selection by clicking on the thumbnail from the selection results on the left side of the map window:

When the thumbnail is expanded, a new view of the information is provided, with a variety of tabs detailing additional information about the selected property:

- Summary
- Transfer History
- Valuation List
- Notice of Assessment (where available)
- Neighborhood Amenities
- Sales Information
- Improvement Information
- Taxes
- Property Record Card
- Forms
- Street View
Summary

From the Summary tab, you can scroll through photos of the property (if available). You’ll also find information such as the owner, parcel ID, legal description, tax district, township and school corporation. The property sketch is located at the bottom of the Summary tab, like shown below:

TIP: If you click on the property sketch, it’ll expand into a larger view, allowing you to see more detail.
Transfer history

Here you’ll find information about previous owners (if any), when the property transferred from one person to another and the sale amount, like shown below:

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Sale Amt</th>
<th>Doc ID</th>
<th>Code</th>
<th>Book/Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>07-20-2020</td>
<td>JONES, RUSSELL B &amp; SARAH M T/E</td>
<td>$435,000.00</td>
<td>2124</td>
<td>TO</td>
<td>20/10539</td>
</tr>
<tr>
<td>08-00-2008</td>
<td>MOORE, LOREN E &amp; JOELLA S REV TRUST</td>
<td>$0.00</td>
<td>QC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-09-2008</td>
<td>MOORE, LOREN E &amp; JOELLA S T/E</td>
<td>$6727</td>
<td>WO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08-10-2006</td>
<td>MOORE, LOREN E &amp; JOELLA S T/E</td>
<td>$550,000.00</td>
<td>WO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09-20-2004</td>
<td>ELITE DEVELOPMENT GROUP LLC</td>
<td>$0.00</td>
<td>WO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09-06-2004</td>
<td>FIFTH THIRD BANK (SOUTHERN INDIANA)</td>
<td>$0.00</td>
<td>SO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01-01-2000</td>
<td>SAGAMORE CREEK DEVELOPMENT LLC</td>
<td>$0.00</td>
<td>WO</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Valuation list

The valuation list includes a year by year history of the property value, like shown below:

<table>
<thead>
<tr>
<th>Year</th>
<th>Reason</th>
<th>Total Value</th>
<th>As of</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>Annual Adjustment</td>
<td>$461,000.00</td>
<td>04-14-2022</td>
</tr>
<tr>
<td>2021</td>
<td>Annual Adjustment</td>
<td>$374,400.00</td>
<td>04-09-2021</td>
</tr>
<tr>
<td>2020</td>
<td>Annual Adjustment</td>
<td>$354,200.00</td>
<td>05-01-2020</td>
</tr>
<tr>
<td>2019</td>
<td>Annual Adjustment</td>
<td>$335,200.00</td>
<td>04-05-2019</td>
</tr>
<tr>
<td>2018</td>
<td>Annual Adjustment</td>
<td>$320,800.00</td>
<td>05-18-2018</td>
</tr>
<tr>
<td>2017</td>
<td>Annual Adjustment</td>
<td>$326,300.00</td>
<td>09-16-2017</td>
</tr>
<tr>
<td>2016</td>
<td>Informal</td>
<td>$328,800.00</td>
<td>01-01-2016</td>
</tr>
<tr>
<td>2015</td>
<td>Informal</td>
<td>$326,400.00</td>
<td>03-01-2015</td>
</tr>
</tbody>
</table>

**TIP:** Don’t forget, you can expand the information by clicking the (aka carat), like previously described on page 4 of this User Guide.
Notice of assessment (where available)

Notice of assessment of land and structures (e.g. Form 11) is a side by side comparison of the previous assessment with the new assessment and effective date, like shown below:

**TIP:** A Quick Response (QR) code has been applied to the upper right corner of the Notice of Assessment. When scanned, the QR code automatically takes the user to the property in Engage.
Neighborhood amenities

Neighborhood amenities describe the characteristics of the property, such as; are public utilities available? Is the neighborhood blighted? Like shown below:

<table>
<thead>
<tr>
<th>Site Description</th>
<th>Public Utilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving</td>
<td>Water</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Declining</td>
<td>Sewer</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Blighted</td>
<td>Gas</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Static</td>
<td>Electricity</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>All Utilities</td>
</tr>
<tr>
<td></td>
<td>Y</td>
</tr>
</tbody>
</table>

Sales information

Sales information includes the sale date, the sale price, and whether it is a valid or multi-parcel sale, like shown below:

<table>
<thead>
<tr>
<th>Sale Date</th>
<th>Sale Price</th>
<th>Valid</th>
<th>Multi-parcel Sale</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/24/2020</td>
<td>$435,000.00</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>04/21/2008</td>
<td>$0.00</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>04/21/2008</td>
<td>$0.00</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>09/26/2006</td>
<td>$0.00</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>03/08/2006</td>
<td>$50,000.00</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>01/30/2003</td>
<td>$28,000.00</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

**TIP:** Notice that some Sale Dates are **blue**, which indicates a hyperlink to the historical sale disclosure (where available).
Improvement information

Here you’ll find a summary of the structure(s) on the property, such as its grade, the year it was constructed, its condition, and its size, like shown below:

TIP: If you click on the button, expanded detail will appear, providing much more information about the structure, such as; # of baths, # of bedrooms, # of fireplaces, heat type, size of attached garage, etc., like shown below:
Taxes

The Taxes tab requires integration with XSoft’s™ INtax™ software. If you don’t see a Taxes tab in your version of Engage™, or if there is minimal tax information provided in the Taxes tab, it means the County uses software other than INtax™ for property tax billing and collection.

With INtax™ integration, you have access to property tax information such as Account Information, Assessed Values, Billing Summary, and the ability to pay your property tax bill online, like shown below:

**TIP:** If you press the tax year button, , you can access the Property Tax Bill, which you can download and/or print.

**BONUS TIP:** If you press the Payments button, , you will be directed to a summary page, detailing all previously paid property taxes, and allowing you to add current taxes to your shopping cart, like shown below:

More information about online property tax payment can be found in the Cool Stuff section of this document, beginning on p. 24.
Property record card

This tab displays the Property Record Card directly within Engage™. You can use the embedded viewing tools to zoom in/out and scroll around the Property Record Card. Or, you can download the Property Record Card and print it or save it for later.

TIP: Where available, access to historical Property Record Cards can be obtained by selecting the collapsible year header.

Forms

On the Forms tab, you'll find a variety of forms made available in Engage™. By selecting an interactive form from the list, you can enter your own information and then print it or submit the form online for review and approval.

Obviously, some forms are more complex than others (e.g. they require a fee, or multiple review agencies are required to provide approval, or they require a signature, etc.). These more complex forms may not be available in Engage™ at this time; however, we’re already working on features to incorporate numerous other forms, regardless of their complexity. These features will be added to Engage™ in a future release.

TIP: Be sure to check out the “Cool Stuff” section of this user guide for helpful hints about Forms.
Street view

Chances are, you’ve probably already used Google Street View in some other application, like Google Maps (www.google.com/maps). You may have zoomed into an address and then clicked on the Google Street View icon 🌍 to view a location at the street level, like below:

With Engage™, we’ve incorporated Google Street View as its own tab within the application. So, you don’t have to leave the Engage™ site to view Google Street View images, as shown below:

**TIP:** Using the Street View tab in Engage™, you have full control of Google Street View via the embedded tools within the application, you can rotate the image 360 degrees or move up/down the street to view other images along the way.
**BONUS TIP:** The Street View tab within Engage™ is intended to keep you from having to leave the Engage™ site to access other data, such as Google Street View. However, we realize that sometimes a larger view is necessary. For this reason, the icon within the Engage™ Street View tab expands the Street View window to be the full size of your screen. When you’re done, pressing the Esc key takes you back to the normal Street View tab.

**BONUS TIP:** The Street View tab within Engage™ relies on the street level imagery being available in Google Street View. If you don’t see imagery in the Street View tab, it means that imagery does not yet exist in Google Street View.
Cool Stuff

As mentioned previously, Engage™ was designed as a cloud application and is intended to be intuitive. If we’ve done our job properly, you shouldn’t need to use this guide for too much direction. That said, there are some not so obvious, but cool features within Engage™, which we want to make sure to point out.

**Parcel quick peek**

On the Map page, once you’ve zoomed into a level where the parcel map is visible, if you hover over a parcel with your mouse, a semitransparent window will appear with summary information for the parcel you’re hovering over (parcel number, address, owner name):

You can dock this window in the upper right corner of the map or click the link to see the full parcel report.

**Interactive forms**

You may have noticed earlier in this guide, when we discussed forms (p. 21), that we used the term *interactive form* and you might be wondering what this means for you. Because you’re using Engage™, which is fully integrated with INcama™ and INtax™, we have access to a lot of information about the parcel and we can pre-populate portions of the form with the information we already know, such as owner name, address, parcel ID, legal description, etc. This means you will have less information to manually enter on the form and less chance for errors. Below are a few examples of forms used in Engage:

- Sales Disclosure
- Appeals Form
- Online Door Hanger
Sales Disclosure Form

When selected, the interactive Sales Disclosure form will auto-populate with known information, such as Parcel Number, Address of Property, Legal Description, Seller(s) / Grantor(s), etc. You can edit this information if it’s incorrect. You can also type in any new information needed to complete the form, such as Conditions, Transaction Details, Sales Data, etc., like shown below:

1. Auto-populated information
2. Manually entered information
3. Download
4. Print

**TIP:** The completed Sales Disclosure Form requires review and approval from numerous county agencies. Because of this, the best way to submit the completed form at this time is to download the completed form, print it, and either hand deliver or mail it to the county.
Appeals Form

When selected, the interactive Appeals form (e.g. Form 130) will auto-populate with known information, such as County, Township, Parcel Number, Address of Property, Legal Description, Name of Property Owner, etc. You can edit this information if it's incorrect. You can also type in any new information needed to complete the form, such as Conditions, Transaction Details, Sales Data, etc., like shown below:

**TIP:** The completed Appeals Form requires review and approval from the county assessor’s office. Because of this, the best way to submit the completed form at this time is to download the completed form, print it, and either hand deliver or mail it to the county. In some counties, Engage™ provides the ability to submit this Appeals form online. More information about online appeals can be found in the Cool Stuff section of this document, beginning on p. 24.
Online Door Hanger

When selected, the interactive Online Door Hanger will auto-populate with known information, such as Parcel Number, Property Address, Deeded Owner, etc. You can edit this information if it’s incorrect. You can also type in any new information needed to complete the form, such as Year Built, Number of bathrooms, Foundation type, etc., like shown below:

TIP: Unlike the Sales Disclosure and Appeals forms, once complete, the Online Door Hanger form can be submitted online to the county assessor. Once information on the form is complete, press the **Submit** button and the form will be sent to the county assessor’s office, with confirmation of the transaction sent to the email address you provided on the form.
Hyperlinks

Because the Property Record Card is an important document associated with each parcel, we’ve included hyperlinks to make accessing the Property Record Card easier than ever. When you see the Property ID number in blue text, clicking on the text (a hyperlink), will take you directly to the Property Record Card for that Property ID number, like shown below:

TIP: Where available, access to historical Property Record Cards can be obtained by selecting the down arrow to the right of the hyperlink and choosing the desired year.
User registration (where available)

Engage™ doesn’t require a username and log in to access the site and view data. However, when performing certain functions, you may be required to create a user account. This simple registration process only requires a valid email address and password, like shown below:

When you select the , you are prompted to Sign in, which then provides the following prompt, at which point you can either sign in using existing credentials or register as a new user.

Online Appeals (where available)

Although not available on all Engage™ websites, the Appeal button, , allows the user to file an online property tax assessment appeal, like shown below:
Auto-populated information
Manually entered information
Submit

**TIP:** Once information on the form is complete, press the **Submit** button and the form will be sent to the county assessor’s office. Confirmation of the transaction will also be sent to the email address provided on the form.
Online Homestead Deduction (where available)

Although not available on all Engage™ websites, the Homestead button, allows the user to file an online Homestead Property Tax Standard / Supplemental Deduction, like shown below:

1. Auto-populated information
2. Manually entered information
3. Submit

**TIP:** Once information on the form is complete, press the button and the form will be sent to the county auditor’s office. Confirmation of the transaction will be sent to the email address provided on the form.
Shopping Cart (where available)

As referenced in the Taxes section of this document (p. 20), you can use Engage to pay your property tax bill online. Once you’ve selected your property (or properties), you can add the property to your shopping cart by selecting the **Add** button, like shown below:

![Shopping Cart](image)

Once you’ve selected the Add button, you’ll need to choose which payment options you want to include (e.g. Spring Due, Fall Due, or Custom Amount), like shown below:

![Payment Options](image)

You can view the items added to your cart by selecting the Shopping Cart icon, located in the top right corner of Engage™, like shown below:

![Shopping Cart Icon](image)

When you’re done adding items to your shopping cart, you can select the **Submit Payment** button, and you’ll be connected with a secure online payment processor, where you’ll enter your payment credentials and contact information.

**TIP:** Engage™ is only integrated with online payment processors, such as CSG Forte (www.forte.net), who adhere to strict Payment Card Industry (PCI) compliance in order to protect sensitive credit card data and other personally identifiable information.
Resources

The Resources page of Engage™ is always expanding to include useful information to enlighten users and help everyone using Engage™ be more productive. Below is an example of the Resources page maintained by Lake County, IN, which includes Public Service Announcements, Frequently Asked Questions (FAQs), Forms, Property Tax Assessment Board of Appeals (PTABOA) meeting dates, agendas, and determinations: