



Property Tax e-Billing

NACCTFO Roundtable on Innovation
July 16, 2011

Presented by: Larry Walker, Auditor-Controller/Treasurer/Tax Collector,
San Bernardino County

SIMPLY A BETTER WAY TO DO BUSINESS®





R&T Code § 2610.5 states:

“Annually, on or before November 1, the tax collector shall mail or ***electronically transmit*** a county tax bill or a copy thereof for every property on the secured roll. ...to mail or electronically transmit the tax bill to the address provided on the tax roll or electronic address ***provided and authorized by the taxpayer to the tax collector.***”



Green County Initiatives:

- EMACS
 - EFT of payroll now 99%
 - Wrapped up with Pay Card
 - Now introducing pilot for e-Pay Earnings Statement
- e-Recording
 - SBC one of the first two counties in CA
 - CeRTNA first e-Recording network in CA
- e-Pay Property Tax
 - Active since 2001
- e-Bill Property Tax
 - Went live in early 2010

Unifying Goal: Being green saves trees and saves \$ for taxpayer and SBC





e-Bill Property Tax: The Challenge

Overall goal: Move processes from paper to on-line

- Specific Issues
 - As of 2010, sending 494,142 bills in US mail
 - Substantial costs for paper, printing and related items
 - Major expense for postage
 - Significant personnel costs: ATC and ISD
- Projected savings per 1,000 bills not sent: \$580
- If 5% enroll in e-Bill Property Tax, savings of \$22,000 first year.



Marketing: “Why Sign Up?”

- Go green, save \$
- Prominent Link on ATC Web homepage
- Link on Tax Collector division page
- Tax (paper) bill insert
- Reminder during e-Pay Property Tax process
- Press release(s)
- Speaking opportunities



Process: How to Sign Up

- Should we make them choose between paper and green? (No)
- Will we be able to enroll multiple parcels? (Yes)
- What can we do to reduce fraud risk? (Postcard?)
- Technical: Can our old legacy system handle this new job?
- Augment existing COBOL and JCL to extract required data



The Sign-up Process:

- Taxpayer applies:
 - Click on link to e-signup page
 - Fill out form including e-mail address
 - Choose e-Bill only or both
 - Use “shopping cart” for multiple parcels
 - Print form, sign, send via U.S. mail to ATC
- ATC Responds:
 - Message to taxpayer
 - Confirms: Thanks for enrolling in e-Bill
 - Verifies working e-mail address



Managing the e-Bill Accounts:

- Send postcard to physical address confirming? (Under consideration)
- If enrolled, Tax Parcel is re-enrolled under new e-mail address?
 - Send message to old e-mail address to confirm/notify
- Match enrollment requests to property owner info
 - Follow up where discrepancy exists between the two
- Review enrollments where multiple bills go to same e-mail address
- Taxpayers who register multiple parcels will receive a single message
 - Bills for all parcels included
- ATC images all enrollment forms
 - Retrievable in Tax Collection system



Coordinating e-Bill and Paper Bills:

- Contract with Third-party for e-Bill delivery
- Generate reports of un-deliverable e-Bills
 - Dis-enroll if not resolved
 - Send paper bill with explanation
- Legacy Tax Collection System
 - Existing print jobs are not changed
 - New process extracts records from Print File for e-Delivery
 - “e-Bill only” bills are removed from printer
 - “e-Bill and paper bill” bills are retained in both processes



ATC Tax Collector

SAN BERNARDINO COUNTY

County of San Bernardino » Treasurer-Tax Collector/Public Administrator - Windows Internet Explorer provided by Filter by ATC W

http://www.mytaxcollector.com/

File Edit View Favorites Tools Help

Convert Select

Favorites Suggested Sites Get More Add-ons

County of San Bernardino » Treasurer...

Home

- Treasurer
- Tax Collector
- Meet Your Treasurer-Tax Collector
- About Us
- Contact Us
- E-Mail Subscription Service
- SBCounty.gov

Tax Bills Delivered to Your Inbox
Electronic Tax Bill Delivery



Welcome!

Our office is committed to providing you with superior customer service by continually improving the tools you need to conduct your business with us effectively and efficiently. This office is staffed by an exceptional group of professionals dedicated to serving the public and various agencies who rely on our services. We are proud to offer you a variety of customer service options to best suit your business needs and welcome your comments and suggestions on how we can be of better service to you.

Tax Collector
The Tax Collector's office is responsible for the collection of property taxes.

Pay Online
Pay your property taxes conveniently, and securely, using our website.



Treasurer
The Treasurer's office provides banking services for all County departments who invest in the County Treasury Pool.

Tax Sale
Tax-defaulted properties may be purchased through our office via an Online Auction. The next sale is tentatively scheduled for May 2012.



Local intranet | Protected Mode: Off 125%

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County of San Bernardino - Tax Collector - Windows Internet Explorer provided by Filter by ATC Web Proxy
http://www.mytaxcollector.com/trDefault.aspx

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Favorites Suggested Sites Get More Add-ons
County of San Bernardino - Tax Collec...

www.mytaxcollector.com En Español

Larry Walker



San Bernardino County Auditor-Controller/ Treasurer/ Tax Collector

Home
Treasurer
Tax Collector
Pay Your Taxes Online
Property Tax Information
Get a Copy of Your Tax Bill
Understanding Your Tax Bill
New Homeowner Information
Important Dates
Mobile Home Tax Clearance
Tax Relief Programs
Tax Sale Information
Transient Occupancy Tax
Bulk Tax Payments
Frequently Asked Questions
Meet Your Treasurer-Tax Collector
About Us
Contact Us
E-Mail Subscription Service

Tax Collector

For fiscal year 2007-2008, the Treasurer-Tax Collector answered more than 257,000 phone calls, responded to 2,500 emails, took over 28,000 walk-in payments, and received over 115,000 electronic payments.

Property Taxes
Search for San Bernardino County secured and unsecured properties. Enter the desired mailing address, Assessor Parcel Number (APN), or unsecured property number to display a list of matching or related records. This search will also include properties that have delinquent property taxes.

Pay Your Property Taxes Online
The Treasurer-Tax Collector's Office has increased your payment options by allowing you to pay using a MasterCard, VISA, American Express, Discover Card, or electronic check. In the future we will be adding the option to pay using your debit card.



Electronic Tax Bill Delivery
You can now enroll to receive your property tax bills electronically. Click the link above to get started with paperless billing.



Request a Mobile Home Tax Clearance Certificate
If you are purchasing a mobile home, or you are acting on behalf of someone purchasing a mobile home, you may request a tax clearance certificate online. Your request will be forwarded to a

Transient Occupancy Tax Information and Forms
Transient Occupancy Tax or "Bed Tax" is charged in addition to hotel and motel room rates.

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Online Enrollment

- Real-time parcel validation against Assessor database.
- Tie new parcel requests to existing registrants if an active enrollment is found.
- Validate email address against black-listed domains and individual addresses to help prevent fraudulent registrations.

Electronic Tax Bills » Enrollment Registration

Electronic Tax Bills Service Registration

Please enter your last name, first name, e-mail address, and phone number below, and add the parcels for which you would like to receive electronic tax bills. Then click "Submit Registration" to save your choices. Remember, you will still have to print, sign, and return the enrollment forms to our office.

Last Name	<input type="text" value="Taxpayer"/>	Parcel Number	<input type="text"/>	<input type="button" value="Add"/>
First Name	<input type="text" value="Joe"/>		<input type="text" value="0168801210000"/>	<input type="button" value="Remove"/>
E-mail Address	<input type="text" value="joe_taxpayer@yahoo.com"/>			
Verify E-mail Address	<input type="text" value="joe_taxpayer@yahoo.com"/>			
Phone Number	<input type="text" value="(909) 387-8308"/>			





Authorization Form

- Terms and conditions of electronic tax bill delivery process clearly stated for taxpayer to acknowledge and accept.
- Taxpayer must sign and return a form for each enrolled parcel prior to receive bills electronically.
- Assessor Parcel Number, taxpayer name, email address and time of online request listed on each authorization form.
- Barcode enables automated retrieval of captured data and activation of enrollment upon receipt of signed form.
- Scanned image of authorization form available to staff through tax collection system.

The form is titled 'Electronic Tax Bill Delivery Authorization Form' and is from the 'TREASURER TAX COLLECTOR, County of San Bernardino'. It contains the following text:

I, the undersigned, hereby authorize the San Bernardino County Treasurer-Tax Collector (TTC) to deliver all future property tax bills, for the parcel listed below, electronically to the e-mail address provided at the time of registration.

Should an attempt by the TTC to transmit tax bill information electronically to its intended recipient be rejected for any reason, this authorization shall be considered void and normal delivery of tax bills via postal service shall be resumed until a new authorization agreement is received and accepted by the TTC.

Failure to receive a tax bill does not relieve the taxpayer of his responsibility of payment or constitute cause of cancellation of penalty and cost charges in cases of delinquency. (R & T Code Section 2610.5)

Registration Information

Parcel: [Redacted]
Name: [Redacted]
E-mail: [Redacted]

I have read and accept the terms and conditions described above, and further certify that I am the billed owner of record, or an authorized agent acting on behalf of the billed owner, for the above referenced parcel.

3/4/2010 10:27:14 AM
Date

Signature

[Barcode]
2010000005





e-Bill

- Property tax bills generated as a full-color PDF and attached to emails by an automated service.
- Each registered taxpayer will receive one email containing bills for all actively enrolled parcels.
- The exception will be if the message size exceeds the SMTP gateway's threshold, in which case the taxpayer will receive their tax bills via multiple emails.

LARRY WALKER • Auditor-Controller/Treasurer/Tax Collector
2011 ANNUAL SECURED PROPERTY TAX BILL

Mailed to: DOE, JOHN Q
PO BOX 123
SAN BERNARDINO CA 92407

172 West Third Street, San Bernardino, CA 92415, (909) 387-8308
www.MyTaxCollector.com

Parcel Number	Bill Number	Tax Rate Area	Total Tax Rate
0123-456-78-0-000	080123456	0018001	1.20000

Description	Assessed Value
Land	80720
Improvements-Future	181175
Improvements-Resale	
Personal Property	7500
Personal-Property-Exemption	
Other Exemptions	247600

Service Agency	For Information Call	Amount
GENERAL TAX Levy	909-388-4500	2418.99
COLLECTOR CONTROL	909-388-8700	3.82
REGISTRATION RECORDS & LOGS	909-388-8700	23.74
TRAILBLAZER/FARMER/DEE TAX	909-388-3501	19.30
SAN BERNARDINO COLLEGE BOND	909-388-8711	48.28
CHUCKS BOND	909-387-1300	2.08
WICKLANDS LAND BOND	909-387-1300	116.25
SOVEREIGN STATE BOND	909-387-1300	5.02
BB VALLEY MUSE WITH DBT BOND	909-387-8000	347.98

Tax Distribution

Make checks payable to: SBC Tax Collector
KEEP THIS PORTION OF YOUR TAX BILL

Check here for a change of mailing address or phone number. Please provide all corrections on the reverse side.
Annual Tax Bill
Fiscal Year July 01, 2011 to June 30, 2012

You can pay online via e-check or credit card at www.MyTaxCollector.com

PAY THIS AMOUNT BY 04-10-2012 \$1,518.91

SEND THIS STUB WITH YOUR SECOND INSTALLMENT PAYMENT
PARTIAL PAYMENTS WILL BE RETURNED

Make checks payable to: SBC Tax Collector
172 W. Third Street, 1st Floor
San Bernardino, CA 92415-0060

AFTER: 04-10-2012 1680.80
1st installment plus 10% penalty, plus \$10.00 cost

102 1 080123456 7 2 010410 00000151891 1 00000148080 0

Check here for a change of mailing address or phone number. Please provide all corrections on the reverse side.
Annual Tax Bill
Fiscal Year July 01, 2011 to June 30, 2012

You can pay online via e-check or credit card at www.MyTaxCollector.com

PAY THIS AMOUNT BY 12-10-2011 \$1,518.92

SEND THIS STUB WITH YOUR FIRST INSTALLMENT PAYMENT
PARTIAL PAYMENTS WILL BE RETURNED

Make checks payable to: SBC Tax Collector
172 W. Third Street, 1st Floor
San Bernardino, CA 92415-0060

AFTER: 12-10-2011 1670.81
1st installment plus 10% penalty

102 1 080123456 7 1 081210 00000151892 7 00000147081 1





Summary:

Green is not only good for the environment.
In San Bernardino County, it is
“Simply a better way to do business”.

Larry Walker

Auditor-Controller/Treasurer/Tax Collector San Bernardino County, CA

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www.sbcounty.gov/atc

mytaxcollector.com

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