



## **CACTTC 2016 June Conference** **Roundtable Topics**

1. If a new (installment) plan is started from a defaulted plan, what do they pay? (20% of what amount?) Do you actually default the pay plan on the day after they are late on the second installment, or do you wait until July 1? Do you reinstate or start a new plan? (Shelley – Tuolumne)
2. Partial Payment for Secured and AB 2691 (Kim – Santa Clara)
3. The Counties which have Medical Marijuana License Ordinance in place can give their experience and functions. (Jegan – Stanislaus)
4. Budgeting interest for the fiscal year? (Keith – Mariposa)
5. Uniformity in penalty cancellation decisions. (Joe – LA)
6. E-payment / Credit Cards – Covered by Session? - “Options for Tax Collection Efficiency” (Kim – Santa Clara)
7. Are there any counties that DO NOT require all estimated taxes for the new year to have been paid (as a deposit) in order for the Assessor to process subdivision requests made after the lien date? (John – Humboldt)

### **Charges on the Tax Roll**

8. Does your Auditor’s office put charges on the tax roll which are not recorded liens or not supported by state code? (Wayne – Siskiyou)
9. How should / could the county educate cities/towns/special districts on valid direct charges to the tax roll. (Peggy – Butte)

### **Tax Sale Related**

10. How do you determine the minimum bid amount on re-offered parcels? What's too low? (Shelley – Tuolumne)
11. When land is sold at a tax sale, but the mobile on the land is not included in the sale, how does the new owner get rid of someone else’s mobile? (Shelley – Tuolumne)
12. What happens to unsatisfied Improvement Bond Act of 1915 assessments on defaulted property sold at a re-offer tax sale for less than taxes and assessments due? (Shelley – Tuolumne)

### **Tax Bill Color / Design**

13. How about the color of Secured bills. Does the tax collector just randomly pick the color each year? Why don’t all of the California Tax Collectors decide on the color each year? (Shelley – Tuolumne)
  - Comment from Cindy Johnson: “Imperial County’s actual bill is always white. What we select each year is the color of the ink for certain fields. We try to select a color that is very different from the previous year’s bills so that we can easily spot those differences when opening and batching our mail payments. This proves to be very helpful in enabling the payments being removed from the mail stream before they hit our electronic system and are subsequently rejected. As for all counties having the same color, we

would not be in favor of that for the same reason. We have a sizeable number of property owners that manage to send us payment for taxes from other counties in our return envelopes by mistake and we feel that the varying colors on the bills from other counties make it much easier to spot those as well”.

### **Innovative Items for Discussion if Time Permits**

1. Chat line on website: San Mateo has a chat line for which we received a County Award for customer service. It allows visitors to our website to speak directly to a live staff member during work hours who can walk them through their transaction whenever assistance is required. A print out of the conversation remains in the file for that parcel which can be printed out by the taxpayer to keep for their records and the Supervisor may also keep a record for performance monitoring. (Sandie – San Mateo))
2. We redesigned our unidentified payments system a few years back linking it to an automated escheatment process. Efficiencies were realized and the focus of the redesign was on the taxpayer. (Joe – LA)
3. Staff now have the ability to reprint just a stub rather than an entire bill saving paper and money. (Chuck – Solano)
4. We’re working with the Auditor’s office to implement accounts payable via ACH to get out of the warrant clearing business. (Chuck – Solano)
5. The biggest cost benefit change in terms of dollars saved has been the implementation of lockbox. We’ve traded 100K+ a year in operating expenses and capital asset depreciation for 45K in lockbox costs. Payments have been shifted to a lockbox for processing (Wells Fargo). This frees up staff at peak times to provide additional customer service. (Chuck – Solano)
6. We’ve worked with local school districts and the office of education to allow them to upload and download their own warrant activity files to the bank. This allows them to reconcile their cash, implement stop pays, and determine the status of a warrant without contacting our office. (Chuck – Solano)
7. We’re in the process of migrating our tax sale to a new platform. (Chuck – Solano)
8. The biggest cost benefit in terms of return on investment has been the bill and insert redesigns. The cost was next to nothing and the results have been tremendous in terms of answering questions before they’re asked and fixing payment errors before they’re made. (Chuck – Solano)