Special Assessment Enrollment Annual Workshop

May 18, 2022

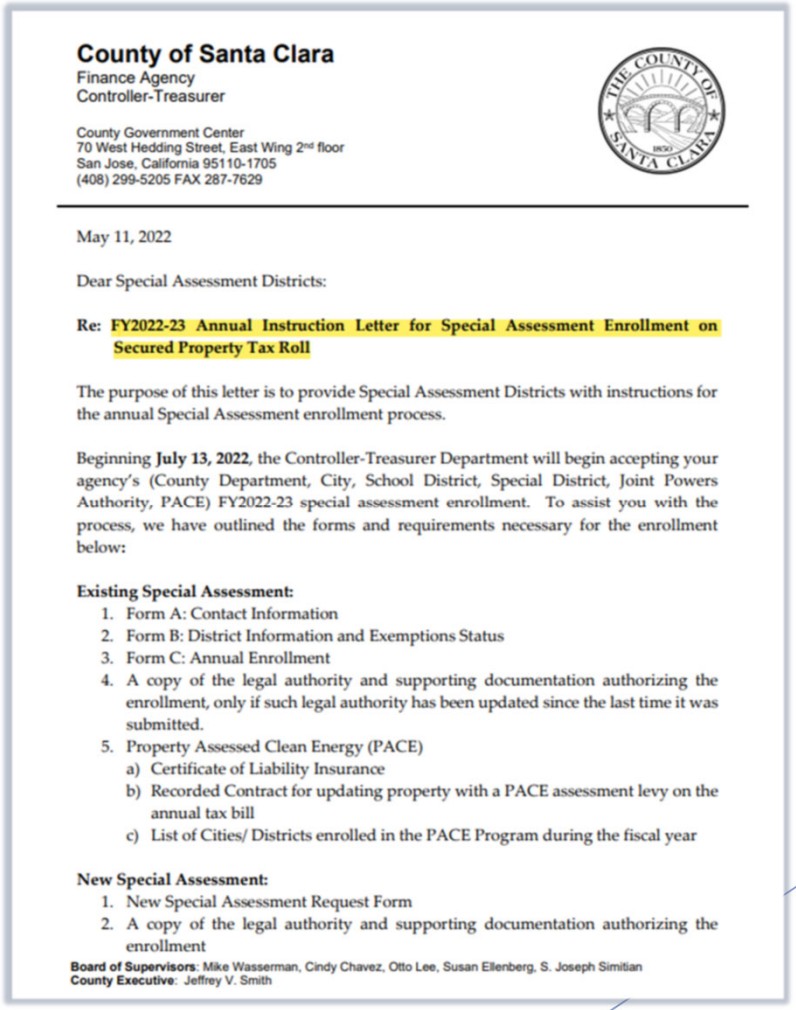
County of Santa Clara

Controller-Treasurer Department

D J H Q G D

1. Introduction
2. FY22-23 Annual Enrollment Instruction Letter
   by Property Tax Unit
3. Timeline and Forms
   by Property Tax Unit
4. Unique Assessor Parcel Numbers
   by Assessor's Office
5. Roll Correction
   by Tax Roll Control
6. Closing

- **Annual Enrollment Instruction Letter**
- **www.sccgov.org/sa**
- **Click on the Annual Enrollment section**



County of Santa Clara
Finance Agency
Controller-Treasurer

County Government Center
70 West Hedding Street, East Wing 2nd floor
San Jose, California 95110-1705
(408) 299-5205 FAX 287-7629

May 11, 2022

Dear Special Assessment Districts:

Re: FY2022-23 Annual Instruction Letter for Special Assessment Enrollment on Secured Property Tax Roll

The purpose of this letter is to provide Special Assessment Districts with instructions for the annual Special Assessment enrollment process.

Beginning **July 13, 2022**, the Controller-Treasurer Department will begin accepting your agency's (County Department, City, School District, Special District, Joint Powers Authority, PACE) FY2022-23 special assessment enrollment. To assist you with the process, we have outlined the forms and requirements necessary for the enrollment below:

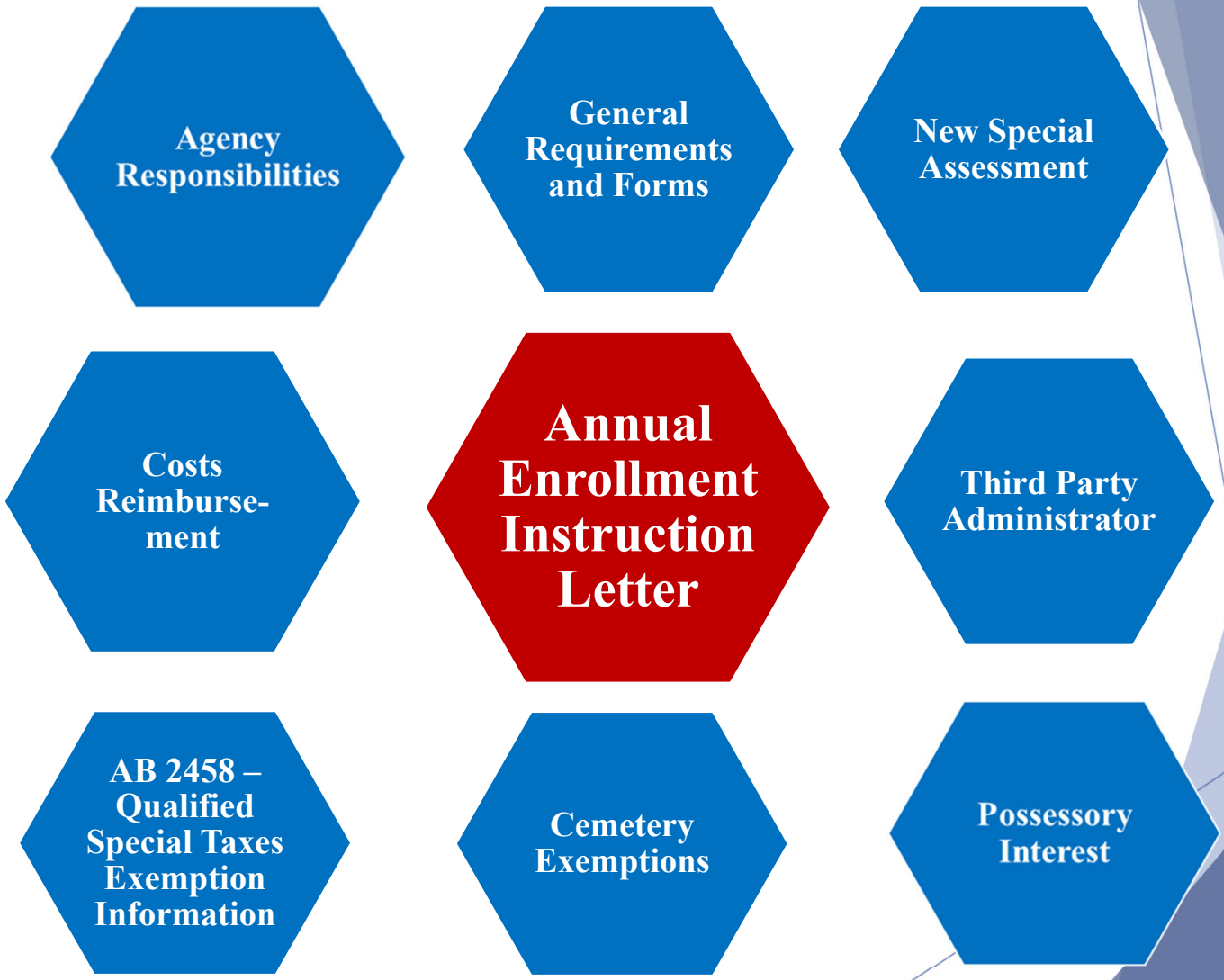
Existing Special Assessment:

1. Form A: Contact Information
2. Form B: District Information and Exemptions Status
3. Form C: Annual Enrollment
4. A copy of the legal authority and supporting documentation authorizing the enrollment, only if such legal authority has been updated since the last time it was submitted.
5. Property Assessed Clean Energy (PACE)
   a) Certificate of Liability Insurance
   b) Recorded Contract for updating property with a PACE assessment levy on the annual tax bill
   c) List of Cities/ Districts enrolled in the PACE Program during the fiscal year

New Special Assessment:

1. New Special Assessment Request Form
2. A copy of the legal authority and supporting documentation authorizing the enrollment

Board of Supervisors: Mike Wasserman, Cindy Chavez, Otto Lee, Susan Ellenberg, S. Joseph Simitian
County Executive: Jeffrey V. Smith


Agency Responsibilities
General Requirements and Forms
New Special Assessment
Costs Reimburse-ment
Annual Enrollment Instruction Letter
Third Party Administrator
AB 2458 – Qualified Special Taxes Exemption Information
Cemetery Exemptions
Possessory Interest

General Requirements and Forms

- ✓ Form A – Contact Information
- ✓ Form B – District Information and Exemptions Status
- ✓ Form C – Annual Enrollment
- ✓ Copy of legal authority and supporting documentation authorizing the enrollment <u>if such legal authority has been updated since the last time it was submitted</u>
- ✓ PACE
  - Certificate of Liability Insurance
  - Recorded contracts [New contract]
  - List of cities/ districts enrolled in the PACE program during the fiscal year

New Special Assessment

- ✓ New Special Assessment Request Form
- ✓ Copy of legal authority and supporting documentation authorizing the enrollment
- ✓ PACE
  - Indemnification and Insurance Agreement
  - Certificate of Liability Insurance
  - Recorded contracts
  - List of cities/ districts enrolled in the PACE program during the fiscal year

COUNTY OF SANTA CLARA
CONTROLLER-TREASURER DEPARTMENT
NEW SPECIAL ASSESSMENT REQUEST FORM

TO BE COMPLETED BY DISTRICT							COUNTY USE ONLY	
SA Name on Tax Bill (Max 24 characters)	Classification [1]	Agency Type	Effective Date	Statutory / Legal Authority [2]	Judiciary Foreclosable [3]	Proration [4]	SA Number [TCAS]	FD Number [SAP]
	-Select-	-Select-			-Select-	-Select-		

Description of the Special Assessment District (Max 600 characters):

☐ Documentation Attached

PACE Additional Documents:

☐ Indemnification & Ins Agreement

☐ Recorded contract for each property, list of cities/ districts

If the Agency's Fund is NOT part of County Treasury, provide the assigned vendor code, or email(s) of Agency Contact(s) to submit additional required documents:

Exemptions: ☐ N/A (skip this section)

☐ Contiguous Parcel ☐ Government Owned ☐ Senior ☐ SSDI ☐ SSI

Enrollment Period: Renewal Frequency

Website:

Contact Name: Phone No:

Email:

[1] CLASS: BOND (subject to accelerated judiciary foreclosable) or BENEFIT (i.e. Landscaping, Delinquent Utilities, Parcel tax)

[2] STATUTORY AUTHORITY under which the district is formed. Example: Mello-Roos, 1915 Bond Act, etc.

[3] JUDICIARY FORCLOSEABLE - Resolution stipulating that the district will pursue the removal of the delinquent assessment amount from the delinquent tax bill in accordance to the district assessment's bond covenants

[4] PRORATION No = 100% Secured, Yes = Prorate between current owner [Secured] and Prior Owner [Unsecured]

Agency Contact

Agency Name	
Mailing Address 1	
Mailing Address 2	
Name (Primary)	
Title	
Phone Number	
Email	
Name (Secondary)	
Title	
Phone Number	
Email	

Public Contact

Name	
Phone Number	
Email	

Consultant Contact

Name	
Agency	
Title	
Mailing Address 1	
Mailing Address 2	
Phone Number	
Email	

Authorized Signature

Printed Name

Agency

Title

Email

Phone No

Date

COUNTY USE ONLY	Received:	Reviewed By:	Completion:	TCAS Date:	Email Notification

New SA# [FORM 06-17]

Third-Party Administrator

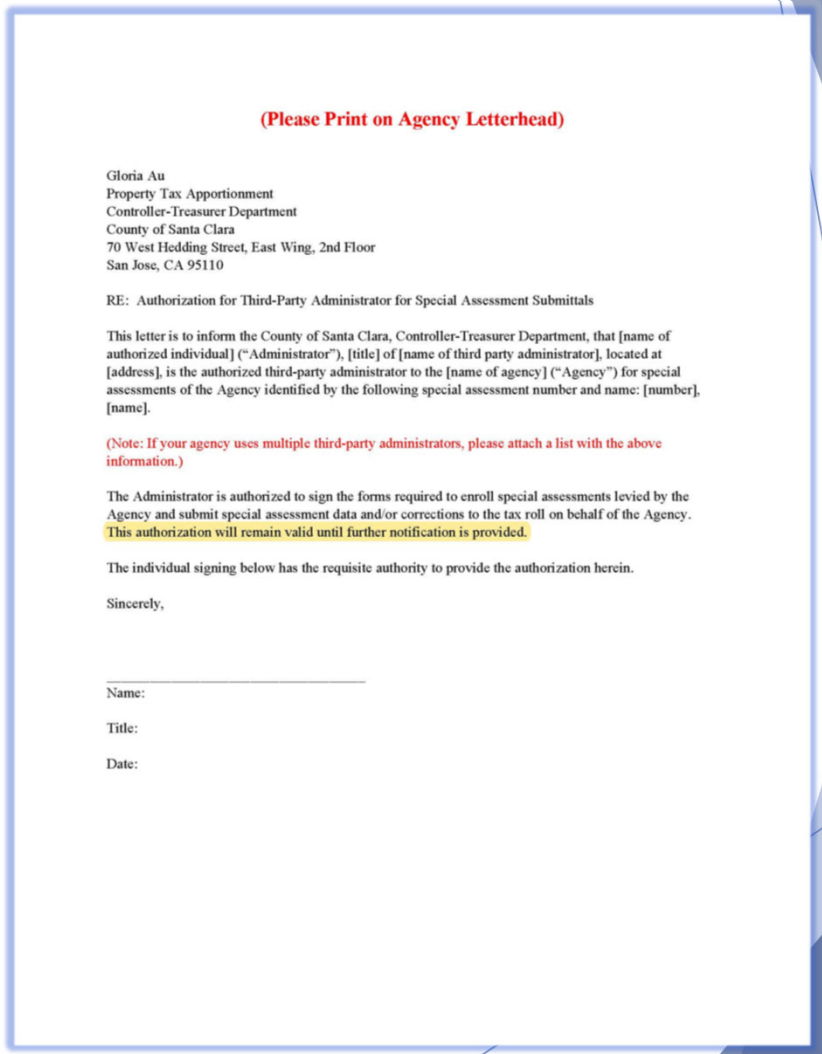
Delegation of Authorization Letter

- If the Third-Party Administrator is authorized to do the following on behalf of the Agency:
  - Sign the enrollment forms
  - Submit special assessment data, and/or
  - Make corrections to the tax roll

- Authorization will remain valid until further notification is provided

For a sample of the letter, please email us or download from our website

- **Delegation of Authorization Letter**
- **www.sccgov.org/sa**
- **Click on the Annual Enrollment section**



(Please Print on Agency Letterhead)

Gloria Au
Property Tax Apportionment
Controller-Treasurer Department
County of Santa Clara
70 West Hedding Street, East Wing, 2nd Floor
San Jose, CA 95110

RE: Authorization for Third-Party Administrator for Special Assessment Submittals

This letter is to inform the County of Santa Clara, Controller-Treasurer Department, that [name of authorized individual] ("Administrator"), [title] of [name of third party administrator], located at [address], is the authorized third-party administrator to the [name of agency] ("Agency") for special assessments of the Agency identified by the following special assessment number and name: [number], [name].

(Note: If your agency uses multiple third-party administrators, please attach a list with the above information.)

The Administrator is authorized to sign the forms required to enroll special assessments levied by the Agency and submit special assessment data and/or corrections to the tax roll on behalf of the Agency. This authorization will remain valid until further notification is provided.

The individual signing below has the requisite authority to provide the authorization herein.

Sincerely,

_____

Name:

Title:

Date:

Possessory Interest Property

- ✓ Parcel Number with prefix “984”
- ✓ Private, beneficial use of publicly-owned, non-taxable real property (e.g. private companies lease government owned facilities)
- ✓ If your agency intends to levy Special Assessment on a possessory interest, please ensure it is a legally valid charge

Cemetery Exemption

- ✓ According to California Constitution, certain cemeteries are exempt from Special Assessment.
- ✓ If your agency intends to levy Special Assessment, please ensure it is a legally valid charge

AB 2458 – Qualified Special Taxes Exemption Information

Approved by the Governor on September 14, 2018, AB 2458 requires school districts which provide exemptions for qualified special taxes for persons who are *65 years of age or older/receiving Supplemental Security Income for a disability/receiving Social Security Disability Insurance benefits*, to **annually provide the following information relating to the exemptions to the County:**

AB 2458 – Qualified Special Taxes Exemption Information

(1) Hyperlink to the location of the Internet website of the school district that contains **exemption information**, if available.

(2) Hyperlink to the location of the Internet website of the school district that contains the **application for the exemption**, if available.

(3) A **phone number** to provide persons with exemption information or direct persons requesting exemption information.

- ✓ The County will provide access to the information with a hyperlink named **"Parcel Tax Exemptions"** on the County's website.

Special Assessment Distribution Schedule

- ✓ Distribution Schedule is posted on:
  - https://controller.sccgov.org/property-tax-distribution-schedule
- ✓ 2 Major Distributions Annually
  - For FY22-23, distribution dates will be
    - January 20, 2023
    - June 23, 2023

Costs Reimbursement- General

Annual placement of special assessment roll	1% of assessment amount
Annual placement of 1915 Act Bond	$16 per parcel
Annual placement of 1911/1915 Act Bond (PACE)	1% of assessment amount
Correction of special assessment amount	$75 each correction
Research – compilation of data	Time spent x Hourly rate

RESPONSIBILITY

The Agency or District is responsible for the **accuracy and the validity of the levy amount**, **assessor parcel number** (of its special assessment roll), AND **information** pertained to its special assessment.

NOT
County Assessor
nor
County Controller-Treasurer
nor
Department of Tax and Collections

RESPONSIBILITY

The Agency or District should also **keep current, and comply with, any changes in legislation.**

FY2022-23 ANNUAL SPECIAL ASSESSMENT ENROLLMENT

TIMELINE/ FORMS/ DATA FILE

Presented by Glenn Payne

County of Santa Clara

FY2022-23 Annual Special Assessment Enrollment Timeline

5/18/2022	Annual Enrollment Workshop
6/1/2022	***Annual Enrollment Instruction Letter**, ***Form A [Contact Information]** and ***Form B [District Information and Exemptions Status]** will be sent to the agency.
6/10/2022	**New Special Assessment: Deadline** for agency with New Special Assessment to contact Controller-Treasurer to set up new account. All new Special Assessment will also need to fill out ***New Special Assessment Request Form.**
6/17/2022	**Deadline** for agency to turn in the verified **Form A and B** *[Contact Information/ District Information and Exemptions Status];* **New Special Assessment Request Form** for agency with new special assessment.
6/30/2022	***Form C [Annual Enrollment Form]** will be sent out to agency. Agency needs to submit this form together with the annual enrollment data file.

FY2022-23 Annual Special Assessment Enrollment Timeline

Early July	Change of Ownership information (for Senior Exemption purposes) is available. Contact Controller-Treasurer if such information is needed.
7/13- 8/5/2022	Annual Enrollment Period: Agency to submit the annual **enrollment data file** and **Form C** *[Annual Enrollment Form].* **Certification of Special Assessment Annual Enrollment** will be sent to agency for **verification.**
8/12/2022	**Deadline** for **corrections on the submitted information.
8/19/2022	**Deadline** for agency to return the **signed Certification of Special Assessment Annual Enrollment.**

Sample

County of Santa Clara Controller-Treasurer Department
Special Assessments
Form A: Contact Information

Effective Fiscal Year FY 2022-23
Special Assessment (SA) Number 1006

No updates to current data ☐

Agency Contact	Current Data	Updates/New
Agency Name	CAMBRIAN SCHOOL DIST	
Mailing Address 1	4115 JACKSOL DR	
Mailing Address 2	SAN JOSE CA 95124	
Name (Primary)	STEPHEN CORL	
Title	CFO	
Phone Number	408-377-2103 x116	
Email	CORLS@CAMBRIANSD.COM	
Name (Secondary)	OLGA SHARGO	
Title	CONTROLLER/BUSS SVCS	
Phone Number	408-377-2103	
Email	SHARGOO@CAMBRIANSD.COM	

Public Contact	Current Data	Updates/New
Name	OLGA SHARGO	
Phone Number	408-377-2103	
Email	SHARGOO@CAMBRIANSD.COM	

Consultant Contact	Current Data	Updates/New
Name	KYLE MARTINEZ	
Agency	DTA	
Title	SENIOR ASSOCIATE	
Mailing Address 1	99 ALMADEN BLVD STE 875	
Mailing Address 2	SAN JOSE CA 95113	
Phone Number	800-969-4382	
Email	KYLE@FINANCEDTA.COM	

Authorized Signature _____ Date _____

Printed Name _____

Agency _____

Title _____ Phone No. _____

Email _____

Sample

County of Santa Clara Controller-Treasurer Department
Special Assessments

Form B: District Information and Exemptions Status

Effective Fiscal Year FY 2022-23

Special Assessment (SA) Number 1006

No updates to current data ☐

District Information	Current Data	Updates/New
Taxing Entity Name	CAMBRIAN SCHOOL DIST	
SA Name on Tax Bill	MEASURE H	
Agency Type	SCHOOL	
Classification	BENEFIT	
Measure & Election Year	MEASURE H	
Resolution/ Ordinance	RES 17-18-07	
Statutory / Legal Authority	RES 17-18-07	
Judiciary Foreclosable	NO	
Proration	NO	
Effective Period	7/1/18 - 6/30/26	
Description of SA (Max 600 characters)	Each parcel owner within Cambrian SD is assessed $84 per parcel per year for 8 years subject to annual adjustment & with exemptions for senior citizens, to provide Cambrian SD elementary & middle school students with stable funding for instruction in math, science, reading, engineering, technology & arts; and to retain highly qualified teachers and maintain class sizes	

Exemptions Status	Current Exemptions Information	Updates/New
Exemptions Status (select all that apply)	☐ No Exemptions (Skip to authorization)	☐ No Exemptions (Skip to authorization)
	☐ Contiguous Parcel	☐ Contiguous Parcel
	☑ Government Owned	☐ Government Owned
	☑ Senior	☐ Senior
	☐ SSDI	☐ SSDI
	☐ SSI	☐ SSI
Exemptions Website	https://www.cambriansd.org/Page/2657	
Enrollment Period	MAY 31	
Renewal Frequency	ANNUAL	
Exemptions Contact Name	OLGA SHARGO	
Phone Number	408-377-2103	
Email	SHARGOO@CAMBRIANSD.COM	
**Note: Exemption information, including exemption contact information, will be made available to the public.*		

Authorized Signature _____ Date _____

Printed Name _____

Agency _____

Title _____ Phone No. _____

Email _____

Sample

County of Santa Clara Controller-Treasurer Department
Special Assessments
Form C: Annual Enrollment Form

Enrollment for Secured Property Tax Bill for **FY 2022-23**
Special Assessment (SA) Number **1006**

District Information					
Taxing Entity Name	CAMBRIAN SCHOOL DIST				
SA Name on Tax Bill	MEASURE H				
Measure & Election Year	MEASURE H				
Resolution/ Ordinance	RES 17-18-07				
Statutory / Legal Authority	RES 17-18-07				
Agency Type	SCHOOL	Classification	BENEFIT		
Effective Period	7/1/18 - 6/30/26	Judiciary Foreclosable	N	Proration	N
Description of SA					
Each parcel owner within Cambrian SD is assessed $84 per parcel per year for 8 years subject to annual adjustment & with exemptions for senior citizens, to provide Cambrian SD elementary & middle school students with stable funding for instruction in math, science, reading, engineering, technology & arts; and to retain highly qualified teachers and maintain class sizes					

Public Contact Information			
Name	OLGA SHARGO	Phone Number	408-377-2103
Email	SHARGOO@CAMBRIANSD.COM		

Please contact us regarding any changes to the information above: SA_Mail@fin.sccgov.org

Annual Enrollment Details				
Parcel Count	Residential	Commercial	Other	Parcel Count Total
				0
Total Annual Assessment Dollar Amount				

AGENCY AGREEMENT:

This is to certify the agency's special assessment amount to be applied on each parcel of real property is correct and valid. I have read and understand the Fiscal Year 2022-23 special assessment instruction letter explaining the terms and conditions, requirements, and the County costs for the agency's special assessment enrollment on the County Annual Secured tax roll, and agree to those terms and conditions therein for all special assessments submitted.

Authorized Signature _____ Date _____

Printed Name _____

Agency _____

Title _____ Phone No. _____

Email _____

County of Santa Clara
Finance Agency
Controller-Treasurer

County Government Center
70 West Hedding Street, East Wing 2nd floor
San Jose, California 95110-1705
(408) 299-5206 FAX 287-7629

Attachment II

SPECIAL ASSESSMENTS DATA REQUIREMENTS

1. The Special Assessment data ***MUST*** be submitted in non-delimited ASCII text format and should not have headers or footers. ASCII text can be produced by using a simple text editor such as MS Notepad or Wordpad. **DO NOT SEND THE DATA IN A SPREADSHEET; IT WILL BE RETURNED TO THE SENDER FOR PROPER FORMATTING.**

2. Use the following Filename Convention: **SA_yyyymmdd_SA#**
   Where: **yyyymmdd** = Four Digit Year, Two Digit Month, Two Digit Date
   SA# = the four digits Special Assessment Number.

3. The data can be delivered to Controller-Treasurer Department as an attachment via E-MAIL.

4. Each record should be formatted as shown below:

   a. DATA LAYOUT: Non-SBE Parcels Only (Record Length = 20)

Data Description	Length	Position
ASSESSOR'S PARCEL NUMBER	8 numbers	1-8
SPECIAL ASSESSMENT CODE	4 characters	9-12
SPECIAL ASSESSMENT AMOUNT	8 numbers	13-20 (w/ leading zeros) - The ***amount must be even cents (.02, .28, etc.)***

A sample of properly formatted Non-SBE data is shown below. The arrows define the beginning and end of each data field:

```
          S/A  S/A
 APN      Code Amount
 ↓        ↓    ↓    ↓
02254016011100079958
```

In this example the parcel number is 02254016, the special assessment code is 0111, and the special assessment amount is **$799.58**.

b. DATA LAYOUT: SBE Parcels Only (Record Length = 21)

Data Description	Length	Position
A. SBE "ASSESSEE NUMBER"	4 numbers	1-4 (w/ leading zero)
B. Tax Rate Area (last 5 digits only)	5 numbers	5-9
C. PUBLIC IMPROVEMENT CODE	4 characters	10-13
D. PUBLIC IMPROVEMENT AMOUNT	8 numbers	14-21 (w/ leading zeros)

A sample of properly formatted SBE data is shown below. The arrows define the beginning and end of each data field:

```
 A.  B.  C.  D.
 ↓   ↓   ↓   ↓    ↓
033607165011100080000
```

In this example the "assessee number" from SBE is 336, the TRA is 007-165, the special assessment code is 0111, and the special assessment amount is **$800.00**.

5. **Form C [Annual Enrollment Form] must be filled and submitted in the email to which the file is attached:**

6. **Submitting corrected data:**
   If the initial data file is to be corrected, please
   - Make corrections and then resubmit the entire file with ALL parcels.
   - Do *NOT* send partial data file which contains just the corrected parcels.

Certification of Special Assessment Annual Enrollment

TCAS

Fiscal Year	2021-22
Taxing Agency	CAMBRIAN SCHOOL DIST
Special Assessment Code & Name	1006 - MEASURE H
Total Amount	$745,673.04
Total Adjusted Amount	$745,673.04
Total APN	8703

Agreed and Confirmed By: _____ **Date:** 8/5/2021

	APN	Amount	Adjusted Amount
1	28805003	$85.68	$85.68
2	28805005	$85.68	$85.68
3	28805006	$85.68	$85.68
4	28805007	$85.68	$85.68
5	28805009	$85.68	$85.68
6	28805010	$85.68	$85.68
7	28805011	$85.68	$85.68
8	28805012	$85.68	$85.68
9	28805014	$85.68	$85.68
10	28805015	$85.68	$85.68
11	28805016	$85.68	$85.68
12	28805017	$85.68	$85.68
13	28805	85.68	$85.68
14	2880	$85.68	$85.68
15	28805022	$85.68	$85.68
16	28805023	$85.68	$85.68
17	28805024	$85.68	$85.68
18	28805025	$85.68	$85.68
19	28805026	$85.68	$85.68
20	28805027	$85.68	$85.68
21	28805028	$85.68	$85.68
22	28805031	$85.68	$85.68
23	28805032	$85.68	$85.68
24	28805033	$85.68	$85.68
25	28805034	$85.68	$85.68
26	28805035	$85.68	$85.68
27	28805036	$85.68	$85.68
28	28805037	$85.68	$85.68

Sample

Email All Forms to:

SA_Mail@fin.sccgov.org

Unique Assessor Parcel Numbers (APNs)

Office of the Assessor
County of Santa Clara

County Government Center, East Wing
70 West Hedding Street, 5th Floor
San Jose, CA 95110-1771
(408) 299-5500 www.scc-assessor.org

Lawrence E. Stone, Assessor

Assessor Parcel Number Descriptions

The Assessor's Office uses specific series' of parcel numbers to separate out items that need to be assessed on the secured roll but have no underlying ability to place a tax lien on the location at which the activity is undertaken. (All parcel numbers are separated into three areas: the first 3 digits represent the **Book**, second two digits represent the **Page** and the last 3 digits represent the individual **Parcel**)

These items are related to possessory interests, mobile homes and water companies. Also included is a quick reference to Delta, or Overflow, parcels.

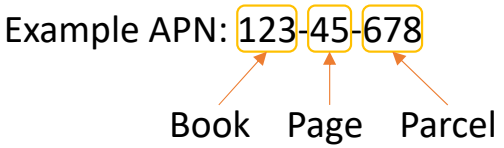
As a general rule all parcels beginning with a 900 series book are not physical parcels with the ability to create a secured lien.

All parcels beginning with Book Number 984 or 985: Possessory Interest

Possessory Interest are the rights obtained to use public property. These rights can be established by way of a lease or an annual rental agreement for use of a particular property or portion thereof. These interests can be related to airports, convention centers, schools, performance halls, etc. As such there can be many possessory interest holders to a single physical location owned by a public jurisdiction. Just this past year we had over 170 possessory interests in the San Jose Convention Center and over 320 at the Santa Clara Convention Center.
We do not yet have any Book 985 parcels as there is enough stock of Book 984 parcels to accommodate our needs.

All Parcels beginning with Book Number 949: Water Company Parcels Used for Tax Apportionment

There are requirements from the State Board of Equalization to assess water companies according to the Tax Rate Areas (TRA) in which they do business, even though they may not physically own property in a particular TRA. This state requirement means that the assessor must create assessments on the secured roll using parcels that have no physical location but carry the correct TRA for property tax apportionment. In our county these are all identified by the book number 949 for the parcels. There are currently 58 active parcels that fit this description.



Unique APNs that are not physical parcels fall into three categories:

1. Book number starts with "9"
   - Possessory Interests (Book 984 & 985)
   - Water Companies (Book 949)
   - Secured supplemental bill for Business Division (Book 9XX)
2. Mobile homes in co-operative ownership (Parcel ≥500)
3. Delta Parcels

Assessor Parcel Number Descriptions
(Continued)

Supplemental Billing for Business Division : 9XX book Parcels

Once a year the Business Division of the Assessor's Office creates supplemental assessments for new construction assessed to a business entity. These assessments are placed on the secured supplemental roll and as such require a parcel number. These parcel numbers begin with a book designation of 9XX, with the XX representing the two digits of the year for which the assessment is active. So a supplemental assessment for the 2016 tax year will have a APN that begins with a 916 book and then random page and individual parcel numbers.

All Parcels Ending with a number at or above 500: Mobile Homes

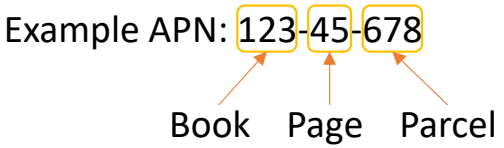
Some of the privately owned mobile homes in the county are required to be assessed on the secured roll and are assigned a parcel number that ends with a number at or above 500. These carry the Book and Page number of their physical location and the above referenced assigned individual parcel number at or above 500. We currently have over 11,000 of these parcels.

Delta Parcels – also called Overflow Parcels

Due to the nature of running a 30+ year old system, there are some limitations that we have to deal with in terms of overall value. One of these items is the built in limit of 8 digits for any total exemption value. What this has required the Assessor to do is create Overflow, or Delta, parcels in the system. These parcels carry the value in excess of $99,999,999 for any parcel that may be subject to an exemption. The main effect of this issue is that hospitals and universities, which are the main entities that carry such large exemptions, have many overflow parcels related to a few actual physical locations. Stanford alone has 72 overflow parcels related to 14 physical parcels.

There are no indicators on the secured roll to identify these parcels, however the Assessor can provide this information upon request to the Assistant Chief Appraiser in the Real Property Department. The email to contact this person is:

ASR-RP-EXEC-AssistantChief@ASR.SCCGOV.ORG



Unique APNs that are not physical parcels fall into three categories:

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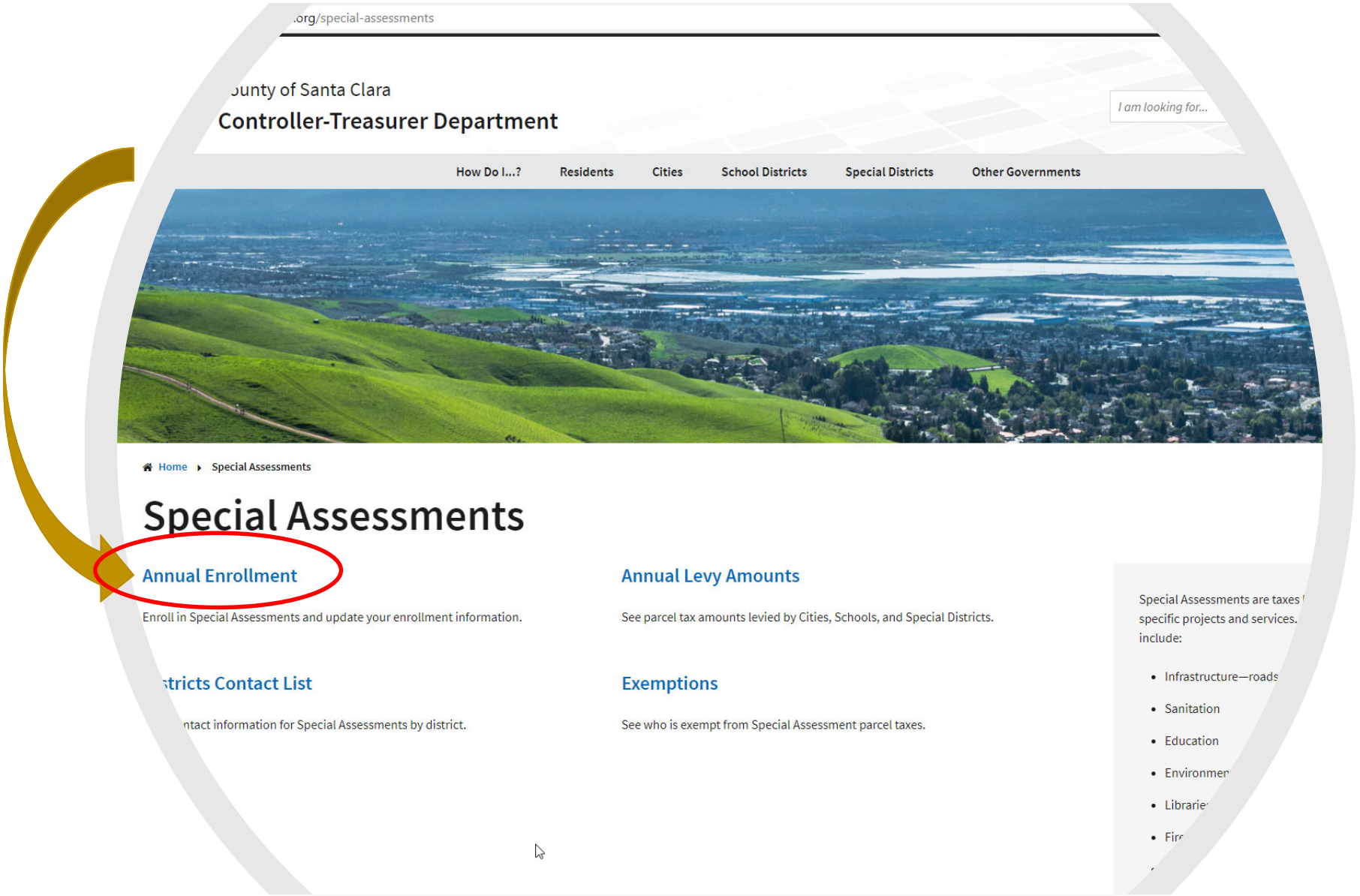
   - Secured supplemental bill for Business Division (Book 9XX)
2. Mobile homes in co-operative ownership (Parcel ≥500)
3. Delta Parcels

https://www.sccgov.org/sa


.org/special-assessments
ounty of Santa Clara
Controller-Treasurer Department
I am looking for...
How Do I...?
Residents
Cities
School Districts
Special Districts
Other Governments
Home
Special Assessments
Special Assessments
Annual Enrollment
Enroll in Special Assessments and update your enrollment information.
Annual Levy Amounts
See parcel tax amounts levied by Cities, Schools, and Special Districts.
tricts Contact List
ntact information for Special Assessments by district.
Exemptions
See who is exempt from Special Assessment parcel taxes.
Special Assessments are taxes
specific projects and services.
include:
Infrastructure—roads
Sanitation
Education
Environmen
Librarie
Fir

Special Assessments: Enrollment

Enrollment Workshop

Learn how to enroll in Special Assessments:

May 2021 Special Assessment Workshop

Enrollment Packet

FY2022-23

Annual Enrollment Instructions

Attachment I: Annual Enrollment Timeline

Attachment II: Data Requirements

Delegation of Authorization Letter (Word doc)

Enrollment Forms

Use these forms to enroll in Special Assessments:

Form A - Contact Information

Form B - District and Exemption Information

Form C - Annual Enrollment

New Special Assessment Request Form

Update Enrollment Information

Use this form to update enrollment information:

Correction or Removal of Special Assessment

Please send Correction/Removal form along with the payment information to:

SA_Mail@fin.sccgov.org
Santa Clara Controller-Treasurer Department
Tax Roll Control Unit
Attn: Special Assessments
70 W Hedding St, 6th Floor, East Wing
San Jose, CA 95110

We accept electronic payments through ACH or wire transfer.

COUNTY OF SANTA CLARA
CONTROLLER-TREASURER DEPARTMENT
REQUEST for CORRECTION/REMOVAL of SPECIAL ASSESSMENT from the PROPERTY TAX BILL

SPECIAL ASSESSMENT NUMBER [SA#]: _____

TO BE COMPLETED BY DISTRICT				
TAX YEAR	**APN**	**ORIGINAL TAX AMOUNT**	**REVISED TAX AMOUNT**	**ADJUSTMENT**
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
				$ 0.00
	TOTAL	$ 0.00	$ 0.00	$ 0.00

AGENCY AGREEMENT:

This is to certify the agency's special assessments in a dollar amount to be removed or corrected on each parcel of real property is correct and valid. I have read and understand the special assessment instruction letter explaining the terms and conditions, requirements, and the County cost of $75 for each correction of special assessment amount.

AGENCY NAME: _____

Authorized Signature _____

Name _____

Title _____

Date _____

Phone _____ Ext: _____

Email _____

Direct Contact Name _____

Mailing Address _____

Phone _____ Ext: _____

Email _____

For Controller-Treasurer Department Use				
	Received	DEPOSIT Number	PROCESS - TRC #	Completion Date
REQUEST				
PAYMENT				
Email Notification		Date:	Deposit	

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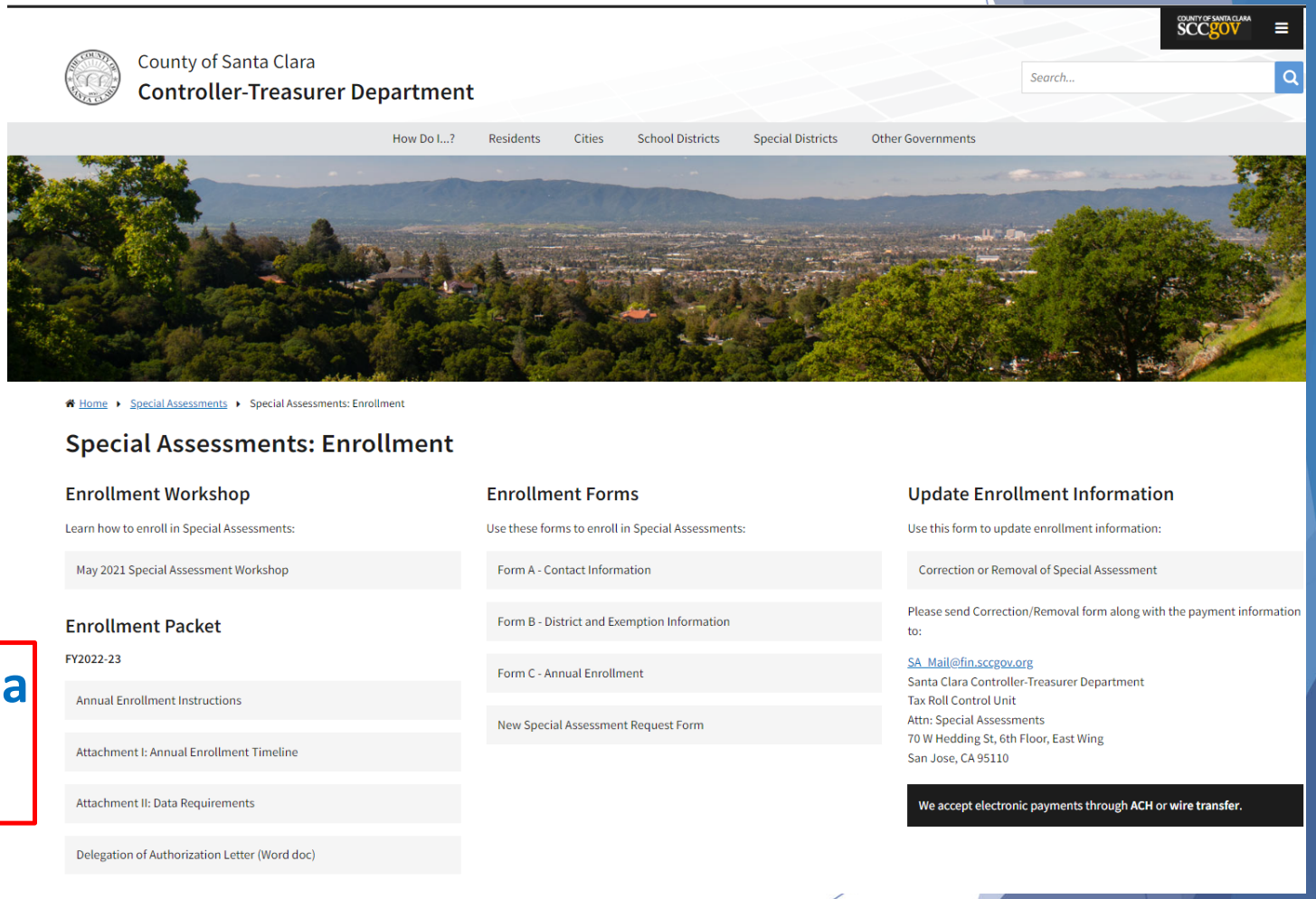
SA_Mail@fin.sccgov.org

Celerina Celeste celerina.celeste@fin.sccgov.org

FY2022-23 Special Assessment Information Online

www.sccgov.org/sa

Click on the Annual Enrollment section



SA_Mail@fin.sccgov.org

Annual Enrollment Contact:
Ivy Chau (Cities & PACE)
Ivy.Chau@fin.sccgov.org
408-299-5142

Sherry Yang (County, Schools & Special Districts)
Sherry.Yang01@fin.sccgov.org
408-299-5234

Roll Correction Contact:
Celerina Celeste (main contact)
Celerina.Celeste@fin.sccgov.org
408-808-7965

MaryAnn Hardwicke
MaryAnn.Hardwicke@fin.sccgov.org
408-808-7960

Assessor's Office Contact:

Jeff Kwan
Jeff.Kwan@asr.sccgov.org
408-299-5398

Thank
you