

Bright Ideas - A Feature Focusing on Innovation

Auditor, ITD Chart Special Assessments Breakthrough



Carol Orth and Jason Guo of Alameda County

The annual process through which special assessments collected on behalf of cities, school districts and other taxing entities are added to tax bills issued by the County has been streamlined thanks to a fruitful collaboration between the Auditor-Controller Agency and Information Technology Department (ITD). Two years of teamwork resulted in the creation of Alameda County's new **Special Assessments Web Portal**, which debuted to rave reviews. The portal has eliminated numerous steps – and potential snags – in the process through which cities and districts submit the special assessment charges included on the property tax bills distributed by the County each year. "It's improved efficiency, lessened the work load for staff and certainly has reduced the potential

for errors," said Carol Orth, Division Chief for the Auditor-Controller's Tax Analysis Unit.

The County collects special assessments on behalf of some 60 cities and local districts, and the process of ensuring these assessments are accurately tallied on every tax bill is not simple. For 2017-18, the task meant accurately assigning \$576 million in special assessment charges to tax bills for 457,000 real parcels in the County. Historically, County staff performed the process manually, which meant building an accurate annual record gleaned from a barrage of emailed text files – as well as CDs, diskettes, tapes and paper files delivered by mail or courier to the Auditor-Controller.

"And when there was an error or discrepancy in the information that was submitted, we would often have to send it back to be corrected, and begin the process all over again," said Jason Guo, Senior Supervising Auditor in the Tax Analysis Unit.

Now, ITD and the Auditor have created an automated process in which records are uploaded by the districts to the new web portal. The portal automatically validates each special assessment record and the Auditor receives clean, accurate documentation from which to assign special assessment charges onto every tax bill. When the new system went live in July, all assessment records were submitted to the Auditor-Controller on time. And the job of assigning special assessment charges to every property tax bill took a fraction of the time it previously had taken.