County of Los Angeles
Department of Auditor-Controller

Direct Assessment Submission Procedure Manual

FY 2014-2015 Processing

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DIRECT ASSESSMENT INTRODUCTION

This is the fiscal year 2014-2015 version of the Los Angeles County Auditor-Controller Direct Assessment Submission Procedure Manual. This manual has been created for use by taxing agencies that submit their direct assessments to the Los Angeles County Auditor-Controller for processing.

The following is a summary of important items and major changes that were made to this year's Direct Assessment (DA) process:

- All DA agencies are required to submit their original input in 25 byte format via DAWeb System Application, except DA accounts handled by the Auditor-Controller Systems Division and accounts with 2 million transactions or greater.

- All legal documents such as Resolution/Ordinance, Billing Agreement, Agency Information Sheet and Data Transmittal must be uploaded to the DAWeb prior to submission of the original data file **(see DAWeb virtual tutorial or DAWeb application procedure manual)**.

- Please ensure that the **Phone Number to be Listed on the Tax Bill** on **your Agency Information Sheet** is filled out correctly. Several agencies placed the incorrect phone number on their Agency Information Sheets last fiscal year, resulting in taxpayers being directed to the incorrect phone number. **The Agency Information Sheet has been revised**. Please ensure that you **use the revised version** when uploading.

- The Auditor-Controller requires that each agency provide a current copy of their Resolution/Ordinance and Billing Agreement annually, even if no changes have taken place. **Indicate your agencies' account number(s) in the top right hand corner.**

- The Auditor-Controller requires DA agencies to upload their Engineering Reports or other supporting documents to show calculation methodology.

- A virtual tutorial is available on the DAWeb site to assist with using DAWeb.

- The Auditor-Controller no longer faxes or mails exception reports. The exception reports can now be accessed by clicking the DA Exception Report link under Help Menu Options on the DAWeb site.

- When a parcel undergoes a parcel change, if the new parcel is billed on the Unsecured tax roll due to a change in ownership, the DA amounts are dropped. Beginning this fiscal year, the Auditor-Controller will be providing agencies a report of DA amounts that are dropped in this situation.

Questions regarding any portion of these procedures should be directed to the Auditor-Controller Tax Division, **Aquilla Ivery-Simmons** of the **Direct Assessment Processing Unit** at **(213) 893-2344.**

DIRECT ASSESSMENT CYCLE

May 1st - July 15th Requests for assignment of the New Accounts will be processed if received by our office as early as **May 1st** and no later than **July 15th. See page v for further instructions.**

July 1st – July 18th Agencies submitting data for the first time are recommended to submit test files via DAWeb with sample production data for review.

July – August Agencies submit original input direct assessments for new tax year beginning **July 1st.**

Auditor-Controller prepares new tax roll with direct assessments that have been provided by taxing agencies. We provide exception reports, parcel change reports and comparison letters for agencies with a significant change in data (> 20% of transaction count and/or dollar amount) from previous year to current year.

September Secured tax bills are printed.

October Special Tax Levied/Paid Report Original Charge (previously LS09) will be available for viewing **(see page 22, Appendix III)** or for downloading via our website at **http://auditor.lacounty.gov**.

DIRECT ASSESSMENT SUBMISSION DUE DATES

To ensure agency direct assessments are included on tax roll, submit direct assessment input as soon as possible beginning July 1st. Cut-off dates are as follows:

July 18th Upload test data via DAWeb.

August 7th Upload of original input data via DAWeb.

August 28th Final day to accept Direct Assessment corrections for new tax year. Any corrections received after **August 28th** are subject to a **$13.00** service charge for each assessment per parcel and year/sequence processed.

NOTE: Direct assessment data cannot be submitted to Auditor-Controller via DAWeb without first uploading the Agency Information Sheet, Resolution/Ordinance, Billing Agreement and Data Transmittal.

We cannot guarantee any agency placement of all direct assessments on tax roll when input is received after established due date of **August 7th**.

DIRECT ASSESSMENT SCHEDULE OF SERVICE CHARGES

1. DA Annual Charges

Original Input:	$0.25 per assessment per parcel/yr sequence
Processing Fee:	$50.00 per account
Set Up Fee:	$250.00 per account for New DA accounts only

2. DA Quarterly Charge

Corrections:	$13.00 per assessment per parcel/yr sequence after tax roll extension

3. DA Confirmation Charges

The Auditor-Controller will provide confirmation that the assessments on specific parcels have been removed/adjusted if the agency makes a request. There will be an additional charge per assessment, per parcel/yr sequence plus processing fee, fax and/or cost of envelope and postage, if any.

NOTE: Additional charges will be based on FY 2014-15 Auditor-Controller Duplication Rates available in September of every new fiscal year.

INSTRUCTIONS FOR REQUESTING A NEW DA ACCOUNT

Submit the following to: **County of Los Angeles**
Auditor-Controller, Tax Division
Apportionment Section
500 W. Temple Street, Room 484
Los Angeles, CA 90012
c/o Ms. Grace Kinoshita, Manager

- Letter requesting new account **(see sample, page vi)**. Letter must be on agency letterhead.

- Copy of approved resolution or ordinance authorizing the Auditor-Controller to place the DA charges on the tax bills.

SAMPLE NEW ACCOUNT LETTER

Insert agency letterhead here

March 17, 2014

County of Los Angeles
Auditor-Controller, Tax Division
Apportionment Section
500 West Temple Street, Room 484
Los Angeles, CA 90012
c/o Ms. Grace Kinoshita, Manager

Dear Ms. Kinoshita,

Please establish a new Direct Assessment account for Fiscal Year ####-## for *[insert bill description here (e.g. Landscaping/Lighting District #1)]*.

I have enclosed a copy of the Resolution authorizing the levy of special taxes.

Please contact me if you have any questions.

Thank you,

John Smith
Finance Manager

enclosure

1.0 SUBMISSION OF DATA

1.1 SUBMISSION OF DATA VIA DAWEB

The Auditor-Controller requires that all original input submission be made via DAWeb, excluding DA accounts handled by the Auditor-Controller Systems Division and DA accounts with 2 million transactions or greater.

To have access granted to the DAWeb, please fill out and submit the **User Identification Form (see page 25)** immediately to Aquilla Ivery-Simmons by e-mail at **aivery@auditor.lacounty.gov** or by fax to **(213) 617-0592**.

Please see the DAWeb application procedure manual and/or virtual tutorial on the DAWeb site for instructions on how to use the DAWeb.

2.0 SUBMISSION OF CORRECTIONS

2.1 CORRECTIONS MADE BEFORE THE ORIGINAL INPUT DEADLINE

Please see the revised DAWeb application procedure manual and/or virtual tutorial on the DAWeb site for instructions on how to submit corrections using the DAWeb.

2.0 SUBMISSION OF CORRECTIONS

2.2 CORRECTIONS MADE AFTER THE ORIGINAL INPUT DEADLINE

Direct assessments that were processed to the Secured Tax Roll system and resulted in an incorrect assessment for a parcel **MAY** be corrected after the original input deadline. ***ROLL CORRECTIONS FOR THE CURRENT YEAR THAT ARE RECEIVED AFTER AUGUST 28th WILL BE SUBJECT TO A $13 SERVICE CHARGE FOR EACH ROLL CORRECTION PROCESSED.***

The Auditor-Controller will accept corrections for current and prior year assessments to decrease or delete an incorrect assessment.

The Auditor-Controller will make corrections only upon receipt of a completed and properly signed Direct Assessment Correction Form **(see page 5 for the Current Year Direct Assessment Correction Form and page 6 for the Prior Year Direct Assessment Correction Form).**

The Auditor-Controller will provide confirmation that the assessments on specific parcels have been removed/adjusted if the agency makes a request. There will be an additional charge per assessment, per parcel/yr sequence plus processing fee, fax and/or cost of envelope and postage, if any.

NOTE: Additional charges will be based on FY 2014-15 Auditor-Controller Duplication Rates available in September of every new fiscal year.

A. Current Year Corrections

Prepare the Current Year Direct Assessment Correction Form **(see page 4 Current Year Correction Instructions)**. Current year corrections that are unpaid or partially paid will result in an adjusted tax bill. Adjusted tax bills are sent to the assessee of record. The Auditor-Controller does not issue refunds resulting from the cancellation and/or reduction of direct assessment charges. Any corrections to an assessment that would generate a refund will be returned to the agency with payment information to assist the agency in processing refunds accordingly.

B. Prior Year Corrections

Prepare the Prior Year Direct Assessment Correction Form **(see page 4 Prior Year Correction Instructions).** Prior year corrections that are unpaid will result in an adjusted delinquent tax bill. Adjusted tax bills will be sent to the assessee of record. The Auditor-Controller does not issue refunds resulting from the cancellation and/or reduction of direct assessment charges. Any corrections to an assessment that would generate a refund will be returned to the agency with payment information to assist the agency in processing refunds accordingly.

2.0 SUBMISSION OF CORRECTIONS

Below are the instructions for filling out Current/Prior Direct Assessment Correction Forms:

1. **Letterhead**
   The Correction Forms **MUST** be submitted on agency letterhead.

2. **Agency Name**
   Enter the Agency Description.

3. **Account Number**
   Enter the Agency Account Number.

4. **Authorization Number**
   Leave blank! For Auditor-Controller use only.

5. **Fiscal Year or Rate Year**
   Enter the 4 digits of the roll year (e.g. if the DA is for the tax year 2014-2015, enter "2014").

6. **Parcel Number**
   Enter parcel number that will be corrected or billed on Secured Tax Roll. If Public Utility, please refer to **Section 3.1 Public Utility Parcel Conversion Procedure** on **page 8**.

7. **Year and Sequence No.**
   Enter the Rate Year and "000" (e.g. if rate year is 2014, enter "2014000").

8. **Check Digit**
   Refer to **Section 3.2 Check Digit Algorithm Calculation Procedure** on **page 9.**

9. **Original Amount**
   Enter the prior amount posted.

10. **Corrected Amount**
    Enter the new direct assessment amount to be posted to the Secured Tax Roll.
    If deleting an assessment, enter "0".

11. **Prepared By**
    Type or print the name of the person preparing the correction form.

12. **Telephone No.**
    Enter the phone number of the person to be contacted if any problems occur.

13. **Authorized Name and Signature**
    Type or print the name of the person authorizing the change and sign.

14. **Date**
    The date the request was signed.

15. **Telephone No.**
    Enter the phone number of person authorizing the change.

2.0 SUBMISSION OF CORRECTIONS

CURRENT YEAR DIRECT ASSESSMENT CORRECTION FORM

Insert agency letterhead here (1)

TO: COUNTY OF LOS ANGELES
AUDITOR-CONTROLLER, TAX DIVISION
DIRECT ASSESSMENT PROCESSING
500 W. TEMPLE ST., ROOM 153
LOS ANGELES, CA 90012

CURRENT YEAR DIRECT ASSESSMENT CORRECTION FORM

AGENCY NAME: (2)

ACCOUNT No.: (3)

AUTHORIZATION No.: (4)
(FOR AUDITOR USE ONLY)

FISCAL YEAR **2014** (5)

#	PARCEL NUMBER	YR & SEQ #	CD	ORIGINAL AMOUNT	CORRECTED AMOUNT	CONFIRMATION DATE
1	0000-000-000	2014-000	(8)	(9)	(10)	
2	(6)	(7)				
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

PREPARED BY: (11)
(PRINT NAME)

PHONE No.: (12)

I hereby authorize the above Direct Assessment Roll Corrections.

AUTHORIZED SIGNATURE: (13)

DATE : (14)

AUTHORIZED NAME:
(PRINT NAME & TITLE)

PHONE No.: (15)

2.0 SUBMISSION OF CORRECTIONS

PRIOR YEAR DIRECT ASSESSMENT CORRECTION FORM

Insert agency letterhead here (1)

TO: COUNTY OF LOS ANGELES
AUDITOR-CONTROLLER, TAX DIVISION
DIRECT ASSESSMENT PROCESSING
500 W. TEMPLE ST., ROOM 153
LOS ANGELES, CA 90012

PRIOR YEAR DIRECT ASSESSMENT CORRECTION FORM

AGENCY NAME: (2)

ACCOUNT No.: (3)

AUTHORIZATION No.: (4)
(FOR AUDITOR USE ONLY)

FISCAL YEAR **2012** (5)

#	PARCEL NUMBER	YR & SEQ #	CD	ORIGINAL AMOUNT	CORRECTED AMOUNT	CONFIRMATION DATE
1	0000-000-000	2012-000	(8)	(9)	(10)	
2	(6)	(7)				
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

PREPARED BY: (11) PHONE No.: (12)
(PRINT NAME)

I hereby authorize the above Direct Assessment Roll Corrections.

AUTHORIZED SIGNATURE: (13) DATE : (14)

AUTHORIZED NAME: PHONE No.: (15)
(PRINT NAME & TITLE)

C. Corrections Due to Foreclosure

When submitting corrections due to foreclosure, the agency should follow the procedures on **page 3 – Corrections Made After the Original Input Deadline.** Indicate "**FOR FORECLOSURE**" on the form to the left of the account number.

D. Property Acquired by a Public Agency

All direct assessments placed on property that is subsequently acquired by a public agency will be pro-rated from the date of acquisition forward.

E. Correction Processing Cut-Off Dates

To ensure corrections are processed during the current fiscal year, Direct Assessment Correction Forms must be received no later than **May 1st**. Correction processing resumes in **September** of the following tax year.

3.0 DA PUBLIC UTILITY AND CHECK DIGIT PROCEDURES

3.1 PUBLIC UTILITY PARCEL CONVERSION PROCEDURE

The Public Utility parcel numbers also consist of 10 digits. Please read below for the procedure of converting Public Utility parcels:

1. If the utility is **OTHER THAN** a railroad company, enter the County Parcel Number as follows:

Digits	Total digits (10)	Content
1	1	"9" (9 is the first prefix of the map book)
2-5	4	Utility Company Number
6-10	5	"00001"

NOTE: Always add 0 or 0s in front of the company number if it has fewer than 4 digits.

E.g.: So Cal Edison Company
Company number 148

Prefix of Map Book	Utility Company Number	Tax Rate Area
9	148	00001

County Parcel Number is **9014800001**.

2. If the utility is a **railroad** company, enter the County parcel number as follows:

Digits	Total digits (10)	Content
1	1	"9" (9 is the first prefix of the map book)
2-5	4	Utility Company Number
6-10	5	County Tax Rate Area

NOTE: Always add 0 or 0s in front of the company number if it has fewer than 4 digits.

E.g.: Southern Pacific Railroad
Company number 007
County TRA 01020

Prefix of Map Book	Utility Company Number	Tax Rate Area
9	007	01020

County Parcel Number is **9000701020**.

3.2 CHECK DIGIT ALGORITHM CALCULATION PROCEDURE

The Check Digit is a form of parcel number validation. The calculated check digit number is arrived at by using the following algorithm:

a. List your parcel number. **2 0 2 0 4 1 8 0 3 7**

b. Start with the first digit of the parcel number **step a** and multiply every other digit by 2.

2	2	4	8	3
4	4	8	16	6

c. Sum the resulting totals from **step b**. If the answer in step b contains two digits, add the number individually to get one number (e.g. 16 would be 1+6)

4+ 4+ 8+ 1+ 6+ 6 **= 29**

d. Go back to parcel number starting with **step a** and add every other number starting with the second digit from parcel number.

0+ 0+ 1+ 0+ 7= 8

e. Add the total result from **step c** to the total result from **step d**.

29
+ 8
Total = 37

Note: If last digit calculated in step e is zero, check digit is zero.

f. Subtract the last digit of the total in **step e** from 10.

10 – 7 = 3

The end result is the check digit = 3.

4.0 DA EXCEPTION REPORT

4.1 DIRECT ASSESSMENT EXCEPTION REPORT

The Direct Assessment Exception Report is a control report provided to the taxing agency by the Auditor-Controller after each update during DA Roll Build-Up. It lists the direct assessment transactions rejected during Secured Tax Roll processing. This report is to be used by the agency as a source document when making corrections. **See the link on the sign-in page on the DAWeb site under Help Menu Options to access the exception reports on the Auditor-Controller website.**

Description:

1. **Report Heading**
   The report heading consists of: (1) the page number; (2) the report name; (3) the agency account number; and (4) the report preparation date.

2. **Agency Number**
   Agency's assigned account number.

3. **Batch Number**
   The batch number assigned to the agency's direct assessment transactions.

4. **Parcel Number**
   The Assessor's identification number.

5. **Check Digit**
   A calculated number used internally by the Auditor-Controller.

6. **Year**
   Secured Tax Roll year to which the direct assessments tried to post.

7. **Sequence Number**
   The number that identifies what segment of a parcel is to be processed.

8. **Recycle Line Number**
   The number used to locate an error transaction during the correction process used internally by the Auditor-Controller.

9. **Authorization Number**
   Assigned by the Auditor-Controller, used internally.

10. **Reason & Origin**
    Codes assigned/used internally by the Auditor-Controller.

11. **Direct Assessment Amount**
    The direct assessment levy amount charge.

12. **Hash Amount**
    Total amount of direct assessments in the transaction.

13. **Error Codes**
    The code that indicates the reason a transaction has been rejected.

14 **Total Parcel Count**

The total number of direct assessment transactions listed.

15 **Description of Common Error Codes**

A key used to explain the most common error codes.

DIRECT ASSESSMENT EXCEPTION REPORT SAMPLE

1

PAGE 1

DIRECT ASSESSMENT EXCEPTION REPORT FOR ACCOUNT NUMBER - 00418
PREPARED DATE: 08/15/99

2 ACCT NUM	3 BATCH NUMBER	4 PARCEL NUM	5 CD	6 YR	7 SEQ	8 LINE NUMBER	9 AUTH #	10 REAS ORIG	11 DA AMOUNT	12 HASH TOTAL	13 ERROR CODES
---	---	---	-	--	---	---	---	---	---	---	---
00418	I00418	3010037032	7	2000	000	08300735210	000153	LC	0000000102090	00000000102090	A30
		3022011002	3	2000	000	05500298815	000153	LC	000000014717D	0000000007375H	L30 L80
		3027021044	7	2000	000	08300742760	000153	LC	000000010209D	0000000010209D	240 L30 L80
		3027021060	6	2000	000	05500308320	000153	C	0000000030781	00000000030781	A50
		3040004029	5	2000	000	05500308320	000153	LC	0000000102090	00000000102090	220
		3040004030	2	2000	000	05500308320	000153	LC	0000000073750	00000000073750	240

TOTAL PARCEL COUNT = 6 14

DESCRIPTION OF COMMON ERROR CODES 15
(1) A30 - INCORRECT CHECK DIGIT
(2) L20 - ACCOUNT NUMBER IS NOT NUMERIC
(3) L30 - DIRECT ASSESSMENT AMOUNT IS NOT NUMERIC
(4) L80 - DIRECT ASSESSMENT HASH AMOUNT IS NOT NUMERIC
(5) L82 - DIRECT ASSESSMENT AMOUNT DOES NOT EQUAL TO THE HASH AMOUNT
(6) 220 AND 240 - PARCEL DOES NOT EXIST ON THE SECURED TAX ROLL
(7) 320 - TRANSACTION IS ATTEMPTING TO POST A NEW DIRECT ASSESSMENT WITH ZERO DIRECT ASSESSMENT AMOUNT
*** FOR ALL OTHER ERROR CODES REFER TO THE APPENDIX OF THE DIRECT ASSESSMENT SUBMISSION PROCEDURES MANUAL ***

4.0 DA EXCEPTION REPORT

STR ERROR CODES FOR DIRECT ASSESSMENT TRANSACTIONS

A10	Parcel number is not numeric or is equal to zeros
A20	Sequence number is not numeric
A22	Year is not a valid roll year
A30	Check digit is not valid
A40	Authorization number must not equal blanks
A50	Reason key is not equal to "L"
A60	Origin key is not equal to "C"
A70	Transaction code is not equal to "580"
L20	Account number is not numeric
L30	Direct Assessment amount must be numeric
L80	Direct Assessment amount is not equal to the hash amount
220*	Parcel is not active on the database
240*	Parcel for particular year and sequence is not active on the database
320	Transaction is attempting to post a new direct assessment with amount equal to zero
430	Transaction is attempting to post a new direct assessment with an invalid direct assessment account number
460	Transaction is attempting to update a roll year greater than the current roll year

*NOTE: These errors often occur because agencies submit direct assessments on parcels that have undergone a parcel change or on non-billable parcels. A primary example of a non-billable parcel would be a Common Area parcel. Common Area generally occurs within condominium projects and planned neighborhood projects. The assessed value on Common Area parcels are deliberately set low ($9) so that a tax bill will not be issued. To minimize these errors, it is suggested that each agency identify and omit assessments for non-billable parcels. It is recommended that the charges be allocated to parcels adjoining the Common Area parcels.

5.0 DA ON PARCELS UNDERGOING PARCEL CHANGE

5.1 PARCEL CHANGE CURRENT YEAR PROCESSING

If the Parcel Change occurs during the current Roll Year, there are two options available:

OPTION 1 Allocate existing direct assessment amounts to new billable parcel(s). This option will automatically divide amount of direct assessment levied on old parcel (parcel undergoing change) equally to new billable parcel(s) being created and placed equally divided amount(s) on new parcel(s).

OPTION 2 Drop the assessments from the roll. When new parcel(s) replace old parcel direct assessment will be deleted. It will be the sole responsibility of the taxing agency to directly bill the party liable for any direct assessments dropped from the roll.

Indicate on the Agency Information Sheet (see page 18 Appendix I) the option you select for each direct assessment account.

The Auditor-Controller may refund paid direct assessments for properties undergoing Parcel Change for the current Roll Year during the current Roll Year.

E.g. Parcel Change in the 2014-2015 fiscal year affects the tax bill for that same year (fiscal year 2014-2015).

The Los Angeles County Assessor has developed an automated methodology for managing direct assessments for properties undergoing a “Parcel Change." "Parcel Change" is the term that describes the process which takes place when a change in the legal description of a parcel results in it changing into one or more new parcels, or many parcels into one parcel.

The Auditor-Controller will process increases after extension of tax roll by request to direct assessments on parcels that have undergone a parcel change. All such requests will be subject to the **$13.00** service charge per assessment per parcel and year/sequence being adjusted. New parcels must be billed on the Secured Tax Roll before taxing agencies submit requests. Taxing agencies choosing **Option 1** may submit Current Year Correction Forms increasing and decreasing amounts for direct assessments that were divided equally on the new parcels or or dropped due to a multiple parcel change.

Under both Option 1 and Option 2, Direct Assessments for parcels undergoing a parcel change will be dropped from the tax roll under the following conditions:

- After pro-ration, any unpaid portion of Direct Assessments levied on parcels undergoing a parcel change due to an acquisition of the property by a public entity.
- Direct Assessments for parcels undergoing a multiple parcel change. Multiple parcel change is defined as a parcel being divided into more than 4 parcels.
- When a parcel undergoes a parcel change, if the new parcel is billed on the Unsecured tax roll due to a change in ownership, the DA amounts are dropped. The Auditor-Controller will provide agencies a report of DA amounts that are dropped in this situation.

5.0 DA ON PARCELS UNDERGOING PARCEL CHANGE

AGENCY REPORTS

The following hard copy reports identify direct assessments on parcels that have undergone a Parcel Change:

1. **Report of Direct Assessment Activity (see page 16, FIG. 5.1)**

   This non-accumulated report is available after each parcel change update. The parcel change system updates approximately once per week from September to June.

   a. If **Option 1** has been selected by the agency, the report will indicate by direct assessment account number the old and new parcel numbers, the direct assessment amount on the old parcel at the time of parcel change, and the amount allocated to the new parcels.

   b. If **Option 2** has been selected by the agency, the report will indicate by agency account number the old parcel number, the direct assessment amount on the old parcel at the time of parcel change, and the amount dropped from the roll.

2. **Agency Summary Report - Hard Copy (see page 17, FIG. 5.2)**

   This non-accumulated report is available after each parcel change update. The parcel change system updates approximately once per week from September to June.

   a. If **Option 1** has been selected by the agency, the report will provide the total direct assessment amount on the old parcels at the time of parcel change, and the total amount allocated to the new parcels for each parcel change update.

   b. If **Option 2** has been selected by agency, the report will indicate total direct assessment amount on old parcel at time of parcel change, and amount dropped from the roll for each parcel change update.

Note: Any mapping questions regarding parcel changes should be directed to the Office of the Assessor, Mapping and GIS Services at (213) 974-7352.

5.2 PARCEL CHANGE PRIOR YEAR PROCESSING

If the Parcel Change occurs for a prior Roll Year (e.g. Parcel Change for 2012 Roll Year made during 2013 Fiscal Year), the direct assessments will be handled as follows:

1. If the direct assessment was fully paid on the old parcel when the Parcel Change occurred, regardless of whether the parcel was current or delinquent, the full amount of the direct assessments will remain on the old parcel and will not be dropped from the Tax Roll.

2. If any portion of the direct assessment remained unpaid when the parcel change occurred, the unpaid amount of the direct assessment will be dropped from the Tax Roll. Collection will be the responsibility of the taxing agency.

AGENCY REPORTS

Report of Delinquent Parcel Activity - Hard Copy (see page 17, FIG. 5.3)

This report is available by direct assessment account number and includes a list of the old parcels for which taxes were not paid timely and were subject to being dropped from the Tax Roll. In addition, the report provides a list of the old parcels.

Note: Hard Copy Agency Report(s) such as:

Report of Direct Assessment Activity (see page 16, FIG. 5.1), **Agency Summary Report (see page 17, FIG. 5.2)** and **Report of Delinquent Parcel Activity (see page 17, FIG. 5.3**) **are only available upon request on an annual basis.**

All requests for hard copy reports must be sent to:

County of Los Angeles
Auditor-Controller, Tax Division
Direct Assessment Processing Unit
500 W. Temple Street, Room 153
Los Angeles, CA 90012
C/O Aquilla Ivery-Simmons

Note: Any mapping questions regarding parcel changes should be directed to the Office of the Assessor, Mapping and GIS Services at (213) 974-7352.

FIG. 5.1 – REPORT OF DIRECT ASSESSMENT ACTIVITY – HARD COPY

ASEPO815 DATE 05/16/00

REPORT OF DIRECT ASSESSMENT ACTIVITY FOR AGENCY: LA CO FIRE DEPT ACCT NO: 007.44

THIS SECTION OF THE REPORT LISTS PARCELS UNDERGOING A PARCEL CHANGE FOR WHICH DIRECT ASSESSMENTS HAVE BEEN REAPPLIED TO THE NEW PARCELS) (OPTION 1) OR DROPPED FROM THE TAX ROLL (OPTION 2).

AN "*" TO THE LEFT OF A NEW PARCEL INDICATES THAT A MULTIPLE PARCEL CHANGE OCCURRED. DIRECT ASSESSMENTS CANNOT BE REAPPLIED TO THE NEW PARCELS. THESE DIRECT ASSESSMENTS HAVE BEEN DROPPED FROM THE TAX ROLL.

FOR FISCAL YEAR 1999-00

LEGEND	PARCEL		YR	SEQ	D.A. AMT	LEGEND	PARCEL		YR	SEQ	D.A. AMT
OLD	5868-019-025	1	99	000	10.66	NEW	* 5868-019-027	9	99	000	.00
NEW	* 5868-019-028	8	99		.00		-				
PACKAGE TOTAL D.A. AMT: OLD PCL				1	10.66	NEW PCL		2		.00	
OLD	8719-004-008	9	99	000	51.64	NEW	8719-004-914	2	99	000	.00
PACKAGE TOTAL D.A. AMT: OLD PCL				1	51.64	NEW PCL		1		.00	
OLD	8719-004-009	8	99	000	51.64	NEW	8719-004-915	1	99	000	.00
PACKAGE TOTAL D.A. AMT: OLD PCL				1	51.64	NEW PCL		1		.00	
OLD	8719-004-010	5	99	000	51.64	NEW	8719-004-916	0	99	000	.00
PACKAGE TOTAL D.A. AMT: OLD PCL				1	51.64	NEW PCL		1		.00	
AGENCY TOTAL D.A. AMT: OLD					165.58	NEW				.00	

FIG 5.2 – AGENCY SUMMARY REPORT – HARD COPY

ASEP0850 DATE 05/16/00 RUN NO: 89

AGENCY SUMMARY REPORT OF DIRECT ASSESSMENT ACTIVITY

FOR FISCAL YEAR 1999-00

AGENCY NAME	ACCT. NO	OLD PARCEL D.A. TOTAL	NEW PARCEL D.A. TOTAL
LA COUNTY HAZARD ABATEMENT	001.96	580.84	.00
COUNTY LIBRARY ASSESSMENT	003.11	22.86	.00
L A CO FIRE DEPT	007.44	165.58	.00
FLOOD CONTROL	030.71	306.67	.00
LA CO PARK DIST	036.92	27.41	.00
L A C0. WEST MOSQUITO AB	061.11	4.82	.00
SAN GABRIEL VY MOSQ ABMT	061.32	21.39	.00
SOUTHEAST MOSQUITO ABATE	061.81	4.11	.00
LA CITY LANDSCAP&LIGHT D	188.50	18.40	.00
LOS ANGELES CITY STREET	188.51	35.02	.00
STORMWATER POLLUTION ABM	188.69	11.48	.00
CITY 911 FUND	188.71	2.87	.00
MWD WATER STANDBY CHARGE	330.11	36.63	.00
MWD WATER STANDBY CHARGE	335.06	10.28	.00
WEST BASIN MWD STANDBY C	375.81	120.00	.00
GRAND TOTAL	1,368.36	.00	

FIG 5.3 – REPORT OF DELINQUENT PARCEL ACTIVITY FOR AGENCY – HARD COPY

ASEP0810 DATE 02/27/02 PAGE 1

REPORT OF DELINQUENT PARCEL ACTIVITY FOR AGENCY: LA CITY LANDSCAP&LIGHT DIST 96-1 ACCT N0: 188.50

THIS REPORT LISTS PARCELS UNDERGOING A PARCEL CHANGE WHICH WERE NOT PAID TIMELY (IN THE TAX YEAR ENROLLED) AND WERE SUBSEQUENTLY PLACED ON THE DELINQUENT TAX ROLL. IF ANY PORTION OF THE TAXES REMAINED UNPAID WHEN THE PARCEL CHANGE OCCURRED, THE FULL AMOUNT OF THE DIRECT ASSESSMENT, BOTH PAID AND UNPAID, HAVE BEEN DROPPED FROM THE TAX ROLL. COLLECTION OF THE DIRECT ASSESSMENT IS THE RESPONSIBILITY OF THE TAXING AGENCY.

FOR FISCAL YEAR 2002-2003

OLD PARCEL (S)	YEAR (S) ON REDEMPTION	NEW PARCEL (S)
2350-012-032	99 000 98 000 00 000	2350-012-919

PACKAGE TOTAL: OLD PARCELS 1 NEW PARCELS 1

6.0 APPENDICES

6.1 APPENDIX I

(Note: Must be submitted on agency letterhead.)

County of Los Angeles
Auditor-Controller, Tax Division
500 W. Temple Street, Room 153
Los Angeles, CA 90012
C/O Aquilla Ivery-Simmons

AGENCY INFORMATION SHEET

_____
(Print Account Number and 16 Character Bill Description)

Please be advised that for fiscal year 2014-2015 (Place initials next to the correct response(s)):

_____1. We will **not** submit Direct Assessment Input for the above referenced account. **(STOP here, initial and go to the last line and provide authorized signature).**

_____ 2. We will submit Direct Assessment Input for the above referenced direct assessment account on or before **August 7th**.

3. **DIRECT ASSESSMENT SUBMISSION REQUIREMENTS**

A. **Agreement for Billing Direct Assessments**
☐ Signed agreement attached

B. **Written Authority to Levy Assessments** (i.e. resolution, ordinance, certified election results)
☐ Written authority attached
☐ Ongoing authority/Resolution (expiration date _____)

_____ 4. We have received, read and understood the 2014 Direct Assessment Submission Procedure Manual; and

_____ 5. We have chosen Option 1 ☐ or Option 2 ☐ for the Direct Assessment Processing Undergoing Parcel Changes **(see page 13 of DA Manual)**.

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

Contact Name: _____**Phone No. To Be Listed On Tax Bill:** _____

Has the above phone number changed since last fiscal year? Yes ☐ No ☐

Consultant/Levying Agency: _____ **Phone No.:** _____

Consultant/Levying Agency E-mail Address: _____

The Auditor-Controller will forward all direct assessment correspondence to the attention of the Director of Finance/Manager. Signature indicates that all above information is correct.

Director of Finance/Manager: _____
(PRINT NAME)

Director of Finance/Manager Signature: _____ **Date:** _____

6.2 APPENDIX II

(Note: Must be submitted on agency letterhead.)

DA Account #:

AGREEMENT FOR BILLING OF DIRECT ASSESSMENTS

This agreement is made and entered into between the *Los Angeles County Auditor-Controller and* ***– (Name of your Agency)—***to provide the service of placement of direct assessments on the Secured Tax Roll and distribution of collections to ***– (Name of your Agency)--***.

I. PROPERTY TAX SERVICES

Los Angeles County will place direct assessments on the Secured Tax Roll and distribute collections to ***– (Name of your Agency)—***at the same time and in the same manner as Los Angeles County property taxes are collected and distributed. ***–(Name of your Agency)—***will adhere to the policies and procedures established by the Los Angeles County Auditor-Controller as outlined in the Direct Assessment Submission Procedure Manual.

Fee for Billing Services

For billing of direct assessments, the Los Angeles County Auditor-Controller shall collect the following charge:

DA Original Submission - $0.25 per assessment per parcel

For correction of direct assessments requested by ***– (Name of your Agency)—***after extension of the tax roll, the Los Angeles County Auditor-Controller will collect $13.00 per correction.

The Los Angeles County Auditor-Controller will charge an additional fee for extended services provided to ***– (Name of your Agency)—***that are outlined in the Auditor-Controller Direct Assessment Submission Procedure Manual.

II. COLLECTION OF AUDITOR-CONTROLLER FEES

Direct Assessment billing charges are collected once a year, on the December 20th advance distribution. Any additional charges are deducted on the next available distribution of monies.

III. ACCOUNTING SERVICES

The Los Angeles County Auditor-Controller has available a report of direct assessments levied for the tax year by parcel and will be provided to ***–(Name of your Agency)--***. Accounting Services beyond this will be considered extended services and will be subject to additional charges and fees.

IV. MODIFICATION OF COLLECTION FEES AND CHARGES

The Los Angeles County Auditor-Controller reserves the right to increase or decrease any charges herein provided, in proportion to any changes in costs incurred by the Auditor-Controller in providing the services described herein, provided that written notice of any increase or decrease in charges is given to ***–(Name of your Agency)--***.

V. AUTHORITY FOR LEVY AND COMPLIANCE WITH LAW

The authority for such levy, (i.e. resolution, ordinance or election), shall accompany requests for the levy of direct assessments. ***–(Name of your Agency)—***warrants that the taxes, fees, or assessments imposed by ***–(Name of your Agency)—***and collected pursuant to this Agreement comply with all requirements of state law, including but not limited to Articles XIIIC and XIIID of the California Constitution (Proposition 218).

–(Name of your Agency)—hereby releases and forever discharges Los Angeles County and its officers, agents and employees from any and all claims, demands, liabilities, costs and expenses, damages, causes of action, and judgments, in any manner arising out of ***–(Name of your Agency)—***responsibility under this agreement or other action taken by ***–(Name of your Agency)—***in establishing a special tax, fee, or assessment and implementing collection of special taxes, fees, or assessments as contemplated in this agreement.

–(Name of your Agency)—agrees to and shall defend, indemnify and hold harmless Los Angeles County and its officers, agents and employees ("indemnified parties") from any and all claims, demands, liabilities, costs and expenses, damages, causes of action and judgments, in any manner arising out of any of ***–(Name of your Agency)—*** responsibility under this agreement, or other action taken by ***–(Name of your Agency)—*** in establishing a special tax, fee, or assessment and implementing collection of special taxes, fees, or assessments as contemplated in this agreement.

VI. AUTHORITY FOR LEVY AND COMPLIANCE WITH LAW (cont.)

If any judgment is entered against any indemnified party as a result of action taken to implement this Agreement, ***– (Name of your Agency) --*** agrees that Los Angeles County may offset the amount of any judgment paid by Los Angeles County or by any indemnified party from any monies collected by Los Angeles County on ***– (Name of your Agency) --*** behalf, including property taxes, special taxes, fees, or assessments. Los Angeles County may, but is not required to, notify ***– (Name of your Agency) --*** of its intent to implement any offset authorized by this paragraph.

VII. TERMS OF AGREEMENT

All existing agreements between Los Angeles County Auditor-Controller and ***– (Name of your Agency)—***pertaining to the collection of direct assessments shall be terminated upon the execution of this agreement. This agreement shall continue from year to year and shall be subject to cancellation by either party by giving a thirty-day written notice to the other party of cancellation.

Authorized Signature: _____ Date: _____
DIRECTOR OF FINANCE/MANAGER

Authorized Name: _____
(PRINT)

For Auditor-Controller Use Only

Approved Signature: _____ Date: _____
SECTION MANAGER

Approved Name: _____
(PRINT)

6.3 APPENDIX III

To access the **Special Tax Levied/Paid Report Original Charge (Previously - LS09)** please go to the following website:

http://auditor.lacounty.gov

Note: Only the current and one prior fiscal years' reports are available on the website. The LS09 is available for fiscal years 2007-2011. Other fiscal years' report(s) may be obtained from the Auditor-Controller for a fee.

1. Click **Property Tax** (near top of page).
2. Go to **Property Tax Report Central** (left side of page).
3. Select **Direct Assessment Payment Listing**. A new page will open.
4. On the new page, choose **Search Secured Master**.
5. Select **Current or Prior Fiscal Year** and **Original Charge**.
6. Type **DA account number** with any leading zeros but with no decimal point.
7. Click **Submit**.
8. When search is complete, click **Download**.
9. Choose **Open or Save**.
10. Open file.

FIG. 6.1 - SPECIAL TAX LEVIED/PAID REPORT ORIGINAL CHARGE – HARD COPY

AUDITOR DAPYMT — SPECIAL TAX LEVIED/PAID — BY ACCOUNT NUMBER — 2010-2011 ORIGINAL CHARGE — PREPARED 01/20/2011 PA

AGENCY 35071

PARCEL	TAX LEVIED	TAX PAID	PARCEL	TAX LEVIED	TAX PAID
8291040009	10.00	.00	8291040010	23.10	.00
8291040012	10.00	.00	8291040013	10.00	.00
8291040014	10.00	.00	8291040015	12.40	.00
8291040016	17.70	.00	8291040017	17.40	.00
8291040018	10.00	.00	8291040019	10.00	.00
8291040020	10.00	.00	8291040021	10.00	.00
8291041001	14.90	.00	8291041002	10.00	.00
8291041003	10.00	.00	8291041004	10.00	.00
8291041005	10.00	.00	8291041006	10.00	.00
8291041007	10.00	.00	8291041008	10.00	.00
8291041009	10.00	.00	8291041010	10.00	.00
8291041011	10.00	.00	8291041012	10.00	.00
8291041013	10.00	.00	8291041014	10.00	.00
8291041015	10.00	.00	8291041016	10.00	.00
8291041017	10.00	.00	8291041018	10.00	.00
8291041019	10.00	.00	8291041020	10.00	.00
8291041021	10.00	.00	8291041022	10.00	.00
8291041023	10.00	.00	8291042001	10.00	.00
8291042002	10.00	.00	8291042003	10.00	.00
8291042004	10.00	.00	8291042005	10.00	.00
8291042006	10.00	.00	8291042007	10.00	.00
8291042008	10.00	.00	8291042011	10.00	.00
8291042012	10.00	.00	8291042013	10.00	.00
8291042014	10.00	.00	8291042015	10.00	.00
8291042016	23.10	.00	8291042022	10.00	.00
8291042023	10.00	.00	8291043001	10.00	.00
8291043002	10.00	.00	8291043003	10.00	.00
8291043004	10.00	.00	8291043005	10.00	.00
8291043006	10.00	.00	8291043007	10.00	.00
8291043008	10.00	.00	8291043009	10.00	.00
8291043010	10.00	.00	8291043011	10.00	.00
8291043012	10.00	.00	8291043013	10.00	.00
8291043014	10.00	.00	8291043015	10.00	.00
9010100001	571.70	.00	9014800001	13,014.30	.00
9014900001	2,051.30	.00	9020100001	461.50	.00
9027900001	309.90	.00	9080400003	11,622.20	.00
9084300003	13,038.30	.00	9110012143	10.00	.00
9227400001	27.50	.00	9253200001	40.00	.00
9260600001	40.10	.00	9272000001	30.40	.00
9274800001	50.00	.00	9775700001	20.00	.00
			AGENCY TOTAL	3,274,574.80	0.00
			AGENCY PARCEL COUNT	308,328	

6.4 APPENDIX IV

To view current status of direct assessment payments/defaults, please go to the Special Tax Levied/Paid Report at the following website below:

http://auditor.lacounty.gov

Note: Only the current and one prior fiscal years' reports are available on the website. The LS09 is available for fiscal years 2007-2011. Other fiscal years' report(s) may be obtained from the Auditor-Controller for a fee.

1. Click **Property Tax** (near top of page).
2. Go to **Property Tax Report Central** (left side of page).
3. Select **Direct Assessment Payment Listing**. A new page will open.
4. On the new page, choose **Search Secured Master or Secured Defaulted**.
5. Select **Current or Prior Fiscal Year.**
6. Select the Paid Run Collection (1st, 2nd, 3rd or 4th Run). **This is a cumulative report.**
7. Type **DA account number** with any leading zeros but with no decimal point.
8. Click **Submit**.
9. When search is complete, click **Download**.
10. Choose **Open or Save**.
11. Open file.

FIG. 6.2 - SPECIAL TAX LEVIED/PAID REPORT – 1ST PAID

AUDITOR DAPYMT — SPECIAL TAX LEVIED/PAID BY ACCOUNT NUMBER 2010-2011 1ST PAID — PREPARED 02/14/2011 PAGE

AGENCY 35071

PARCEL	TAX LEVIED	TAX PAID	PARCEL	TAX LEVIED	TAX PAID
8291042022	10.00	5.00	8291042023	10.00	5.00
8291043001	10.00	5.00	8291043002	10.00	.00
8291043003	10.00	5.00	8291043004	10.00	5.00
8291043005	10.00	5.00	8291043006	10.00	5.00
8291043007	10.00	5.00	8291043008	10.00	10.00
8291043009	10.00	5.00	8291043010	10.00	10.00
8291043011	10.00	10.00	8291043012	10.00	5.00
8291043013	10.00	5.00	8291043014	10.00	5.00
8291043015	10.00	5.00	9010100001	571.70	285.85
9014800001	13,014.30	6,507.15	9014900001	2,051.30	1,025.65
9020100001	461.50	230.75	9027900001	309.90	154.95
9080400003	11,622.20	5,811.10	9084300003	13,038.30	6,519.15
9110012143	10.00	5.00	9227400001	27.50	13.75
9253200001	40.00	20.00	9260600001	40.10	20.05
9272000001	30.40	30.40	9274800001	50.00	25.00
9775700001	20.00	10.00			
			AGENCY TOTAL	3,273,070.13	1,793,774.58
			AGENCY PARCEL COUNT	308,279	

FIG. 6.3 - SPECIAL DEFAULTED TAX LEVIED/PAID REPORT – 1ST QTR REDEMPTION

PAGE 45063 — SPECIAL DEFAULTED TAX LEVIED/PAID BY ACCOUNT NUMBER 2010-2011 1ST QUARTER REDEMPTION — RUN DATE: 11/15/2010 PROGM ID: DA100000

AGENCY 35071

PARCEL NO	ROLLYR	SEQNO	TAX DUE	TAX PAID	SECPDUE	SECPPD	REDPDUE	REDPENPD
8291016016	2009	000	.01	.01	.00	.00	.00	.00
8291017012	2009	000	5.00	5.00	.50	.50	.08	.08
8291020014	2009	000	10.00	.00	1.00	.00	.00	.00
8291022006	2006	000	4.99	4.99	.50	.50	1.49	1.49
	2007	000	10.00	9.78	1.00	1.00	1.20	1.20
8291022010	2008	000	4.99	.00	.50	.00	.00	.00
8291026019	2009	000	4.99	4.99	.50	.50	.30	.30
8291026028	2009	000	5.49	5.49	.50	.50	.33	.33
8291026036	2008	000	10.00	.00	1.00	.00	.00	.00
	2009	000	10.00	.00	1.00	.00	.00	.00
8291028008	2009	000	4.99	.00	.50	.00	.00	.00
8291028012	2009	000	4.50	4.50	.45	.45	.13	.13
8291031019	2009	000	10.00	10.00	1.00	1.00	.30	.30
8291032008	2009	000	4.99	.00	.50	.00	.00	.00
8291038004	2003	000	10.00	5.88	1.00	1.00	10.51	10.51
	2004	000	10.00	.00	1.00	1.00	8.70	8.70
	2005	000	10.00	.00	.99	.99	6.85	6.85
	2006	000	10.00	.00	1.01	1.01	5.14	5.14
	2007	000	10.00	.00	.99	.99	3.27	3.27
8291043002	2009	000	10.00	.00	1.00	.00	.00	.00
8291043004	2009	000	4.99	.00	.50	.00	.00	.00
8291043015	2009	000	4.99	.39	.50	.50	.23	.23
9084300818	2003	000	209.72	.00	20.98	.00	.00	.00
9084301048	2000	000	382.43	307.10	.00	.00	.00	.00
9084303507	1997	000	1.89	.00	.19	.00	.00	.00
9084307294	1994	000	15.76	.00	1.58	.00	.00	.00
9084307349	1997	000	80.28	79.86	.00	.00	.00	.00
9084307947	1997	000	2.27	.00	.23	.00	.00	.00
*TOTAL AGENCY NO 35071			303,831.58	79,666.12	29,750.88	11,216.49	25,441.50	22,110.85

6.5 APPENDIX V

For detailed information and/or to purchase Assessor's Data such as Local Roll, Tax Parcel Base Map, etc. please go to the website (under Data for Sale) at **http://assessor.lacounty.gov** or contact the following:

Los Angeles County Assessor
Information Technology Division
Property Data Sales
500 West Temple Street, Room #291
Los Angeles, CA 90012-2770

Phone #: (213) 974-3363 or (213) 974-2537
Days: Monday through Friday (except Holidays)
Hours: 7:30 a.m. to 5:00 p.m. PST
E-mail: **datasales@assessor.lacounty.gov**

7.1

COUNTY OF LOS ANGELES
AUDITOR-CONTROLLER, TAX DIVISION
DIRECT ASSESSMENT (DA) WEB ACCESS
USER IDENTIFICATION FORM

1. USER REQUEST INDICATOR:

☐ NEW USER (1)	ACCOUNT MODIFICATION(S) (2) ☐ ADD ☐ DEACTIVATE	☐ CANCELLATION (3)
Complete parts 2 thru 4	Add Acct(s) - Complete parts 2 thru 4 Deactivate Acct(s) - Complete parts 2, 3A and 4	Complete parts 2 thru 4

2. USER INFORMATION:

_____ _____
FIRST NAME **LAST NAME**

_____ _____
USER NAME (4) **E-MAIL ADDRESS**
(25 CHARACTERS OR LESS – MAY BE ALPHA AND/OR NUMERIC)

3. DA AGENCY INFORMATION (5): _____
CITY NAME

A. Agency #	B. Agency Description	C. Bill Description (16 CHARACTERS OR LESS)

4. USER REQUEST AUTHORIZATION:

Director of Finance/Manager Signature: _____ **Date:** _____

Director of Finance/Manager: _____ **Phone No.:** _____
(PRINT NAME)

NOTE:
(1) **'NEW USER' –** for brand new user who has never had DAWeb access. Also, you will be able to choose a password the first time you log onto the DAWeb.
(2) **'MODIFICATIONS' –** for users who already have DAWeb access and would like to either add or de-activate their DA account(s).
(3) **'CANCELLATION' –** for users who would like to completely cancel their DAWeb access.
(4) You will only need one User Name for all accounts. If your agency has more than one user, please submit an additional form for each user.
(5) If you have more than one account, please list them all in numerical order and use the additional attached form as necessary.

7.0 FORMS

ADDITIONAL FORM FOR DIRECT ASSESSMENT INFORMATION

A. Agency #	B. Agency Description	C. Bill Description (16 CHARACTERS OR LESS)

Please fill out and submit the form immediately to Aquilla Ivery-Simmons by e-mail at **aivery@auditor.lacounty.gov** or by fax at **(213) 617-0592**.