



# Recent Improvements & COVID-Related Changes to TTX Forms & Processes



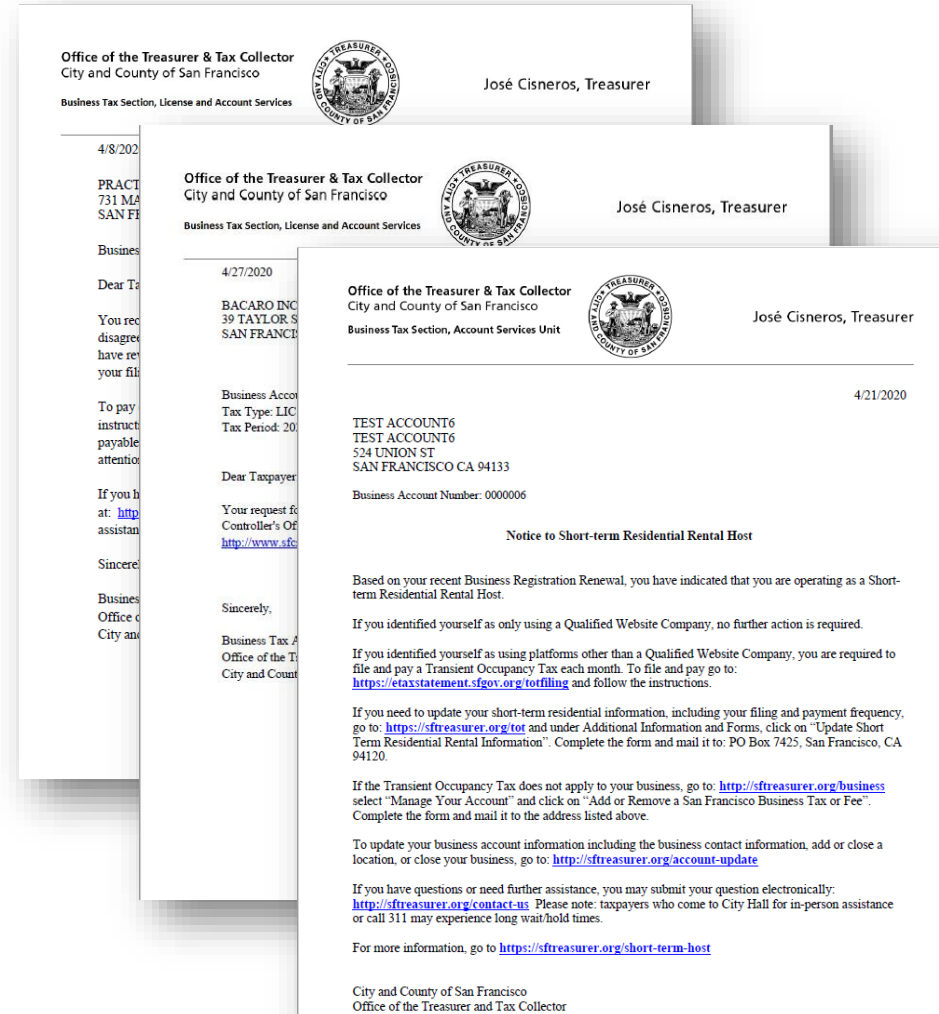
# PDF Bundling of OnBase Letters





# Digitized Letter Generation for 27 Letter Types – 4/2/20

- Improved OnBase letter generation from a paper process to a digital process.
- Bundled PDFs are now reviewed by sections and sent via email to Repro to be printed and mailed.





# Penalty Waiver COVID Changes



# Waiver Changes to Support COVID (PT & BT) – 4/2/20

## Added COVID checkbox to front end

Waiver Request Reason \*

I am requesting a waiver because of circumstances related to COVID-19 (enter additional explanation in text box below).  
In the text box below, provide the specific circumstances that support your application for penalty waiver.

Specific Comments

Cancel Submit

## Added COVID keyword to OnBase

Keywords

DocuSignEnvelopeID  
D5B387D4-0555-44CD-918B-2D0E195DCB2

Covid19  
YES

## Added COVID-19 as a waiver approval reason

Waiver Request Reasons

Please Select Waiver Reason \*

COVID-19

Economic Hardship

Illness/Injury prevented payment

Paid Timely





# New Business Registration Ownership Changes





# Change of Ownership – 5/1/20

## Introduction

City and County of San Francisco  
Office of The Treasurer & Tax Collector  
Business Registration Application

*Fields marked with \* are required*

### Important Information Before You Begin Your Application

#### Step 1 - Complete the Application

Once submitted you cannot change your application. You must complete your application in a single session.

Have the following items ready before you begin the application:

- Federal Tax Identification Number (FEIN, SSN, or TIN)
- Estimated San Francisco Gross Receipts
- Estimated San Francisco Payroll Expense
- Legal structure of your business
- Ownership name(s) & address(es)
- Address of each location in San Francisco where you do business
- Valid Email Address
- Business Account Number of the existing business if purchasing or changing structure of an existing business
- Payment Information (credit card, debit card or checking account information)

[Click here for instructions on completing the business registration application](#)

#### Step 2 - Sign the Form

You will receive an e-mail with instructions to electronically sign the application after it has been submitted.

#### Step 3 - Pay the Business Registration Fee (if applicable)

You will receive your Business Account Number immediately by paying online using e-check, credit or debit card.

I have read all of the above information \*

Go Back

Continue

Added note instructing TP to have BAN of existing business available if purchasing or change structure of an existing business.



# Change of Ownership – 5/1/20

Added fields to collect data related to business sale/re-organization

Added drop down for type of change (Org type change or Ownership change)

Introduction **Business Information** Ownership Information Officer Information Contact Information Location Information Registration Fees

Cancel / Exit X

### Business Information

City and County of San Francisco  
Office of The Treasurer & Tax Collector  
Business Registration Application

*Fields marked with \* are required*

**Your Business**  
Sole proprietor or individual applying, enter first and last name. Do not enter your trade name.

Name (as shown on your income tax return) (Sole proprietors, enter first & last name.) \*

Business Tax ID (SSN, FEIN, TIN) \*

Select Organization Type \*

Start Date in San Francisco \*

*Future dates not accepted (mm/dd/yyyy)*

Is this a change of ownership for an existing business? \*

Type of ownership change \*

Business Account Number of existing business. \*

Change in Entity's Organization Type  
Change in Entity's Ownership

Added field for new registrant to notify TTX of previous/existing BAN







# Business Tax Payment Portal Payments Tab



# Payments Tab – 5/2/20

## Office of the Treasurer and Tax Collector

### Business Tax Payment Portal

Business Account Number (BAN)  
0000001

Business Name  
Test-Treasurer & Tax Collector's Office

You may review and update your business information through [Account Update](#).

Due

Payments

Select the obligation(s) you would like to pay by checking the boxes at the left. The "Amount to Pay" will default to the Amount Due listed. If you wish to pay an amount other than the amount due, enter the amount you would like to pay in the "Amount to Pay" field. Some obligation types do not allow payment amounts less than the Amount Due.

After selecting the bills(s) to be paid, click "Credit/Debit" or "Electronic Check" to pay online, or click "Print Payment Stub" to print a stub for mailing your payment. For more information related to payments by ACH or wire, click [here](#).

If no obligations are displayed below, then no obligations are currently available to be paid online.

To pay Business Personal Property assessments not displayed below, click [here](#) to go to the Unsecured Personal Property payment portal.

Click [here](#) for detailed instructions and frequently asked questions.

Select to Pay	Obligation Type	Tax Year/Period	Business Name	Location	Bill Number	Amount Due	Amount to Pay
<input type="checkbox"/>	Business Registration	2021/01	24 HOURS	123 MARKET ST	2121018358	\$107.00	\$0.00
<input type="checkbox"/>	Business Registration	2021/01	CIG Testing	1155 MARKET ST	2121036637	\$107.00	\$0.00

Added a "Payments" tab to the BT payment portal



# Payments Tab – 5/2/20

- TP can sort by Obligation Type, Tax/Fee Period, Effective Pay Date, Payment Amounts
- Payments received in last 24 months are displayed

**Business Tax Payment Portal**

Business Account Number (BAN) 0000001      Business Name Test-Treasurer & Tax Collector's Office

You may review and update your business information through [Account Update](#).

Due    **Payments**

Navigation: [Home] [Previous] [Next] [End]      P 1 / 1 (1 items)

<a href="#">Tax / Fee Type</a>	<a href="#">Tax Year / Period</a>	<a href="#">Effective Pay Date</a>	<a href="#">Payment Amount</a>
PY Tax 2019	2019/Q4	2020-02-29	\$2.01

Note: payment of displayed obligations may not constitute payment in full of all tax liabilities. This does not reflect any obligations referred to collections.

**Cancel**







# Property Tax Penalty Waiver Form Updates to Support Governor's Program



# Governor's Program Waiver Changes – 5/27/20

## Secured

### Waiver Request Reason \*

I am requesting a waiver because of circumstances related to COVID-19 (enter additional explanation in text box below).

The following questions are optional and may qualify you for the Governor's penalty waiver program, which waives certain penalties through May 5, 2021.

The property for which I am requesting this waiver is my primary residence that I occupy.

The property for which I am requesting this waiver is a business that I own and operate and qualifies as a small business as defined by the Small Business Administration.

Business Account Number \*

Business Account Number

In the text box below, provide the specific circumstances that support your application for penalty waiver.

Specific Comments

Added checkboxes related to Gov Gavin Newsom's Order:

- Primary Residence
- Small Business (BAN)

## Unsecured

### Waiver Request Reason \*

I am requesting a waiver because of circumstances related to COVID-19 (enter additional explanation in text box below).

The following questions are optional and may qualify you for the Governor's penalty waiver program, which waives certain penalties through May 5, 2021.

The property for which I am requesting this waiver is my primary residence that I occupy.

The property for which I am requesting this waiver is a business that I own and operate and qualifies as a small business as defined by the Small Business Administration.

Please enter your BAN in the Unsecured Property Tax Bill Information section above, if available.

In the text box below, provide the specific circumstances that support your application for penalty waiver.

Specific Comments





# Account Update Business Closure

## COVID Related Closure Reason

## Change of Ownership





# COVID Related Closure Reason – 6/1/20

## Business Closure

Closing your business means you have ceased all business activity in San Francisco as of the date you provide below. You will be unable to conduct business in San Francisco unless you open a new business account and pay applicable fees. If you are changing your ownership type, close the business and open another business via <http://sftreasurer.org/registration>

Read the statements below and answer Yes or No to the questions to below.

Do you wish to close all locations (any address listed under the view locations section) immediately and cease operating in San Francisco?

If you close all locations but wish to keep this registration active, then select NO.

Do you acknowledge that all permits/licenses will be inactivated per the effective date of closure provided below and will not be renewed?

If you are changing your ownership type, close this business and open another business via <http://sftreasurer.org/business-form-central>  
If you are a permit holder, you will need to re-apply for all your permits once you have completed your new business registration application and received your new business registration certificate number.

Do you acknowledge that it is your responsibility to file a Payroll Expense Tax and Gross Receipts Tax Short Period Return for Taxpayers Ceasing Business for the year in which business ceased in San Francisco if the taxable payroll expense for the reporting tax year is greater than \$150,000, or taxable gross receipts for the reporting tax year is greater than \$500,000?

Do you acknowledge that it is your responsibility to pay any outstanding obligations or debt on a closed account?

Do you acknowledge that any third party filer of Transient Occupancy or Parking Tax must surrender all Certificates of Authority in your possession to the Office immediately upon closing or sale of the business?

Mail to Office of the Treasurer & Tax Collector, P.O. Box 7425, San Francisco, CA 94120-7425.

Are you closing this business account because of a change to the ownership of the business, such as a change to the ownership structure or the sale of the business?

Reason\*:

I am closing my business due to circumstances related to COVID-19.

Effective Date of Closure in San Francisco\*:

Added checkbox “I am closing my business due to circumstances related to COVID-19.”



# Change of Ownership – 6/1/20

Added fields to collect data related to business sale/re-organization

Added drop down for type of change (Org type change or Ownership change)

**Business Closure**

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Are you closing this business account because of a change to the ownership of the business, such as a change to the ownership structure or the sale of the business?  
Type of ownership change\*:    
Please enter the BAN for the new business entity, if available:

Reason\*:  I am closing my business due to circumstances related to COVID-19.

Effective Date of Closure in San Francisco\*:

Added field for business to notify TTX of new BAN

