

Office of the Assessor-Recorder Taxpayer Help Pages

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Community Portal

What is Community Portal?

Community Portal is an external public facing interface designed specifically for taxpayers. They have the ability to quickly access ASR services and their records 24 hours a day, 7 days a week.

Taxpayers can:

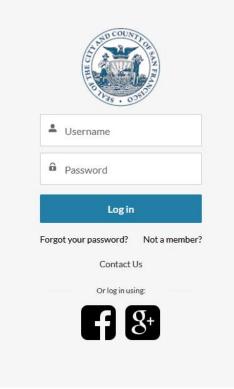
- E-file annual statements for BPP, Exemptions, and Marine (no need to mail forms)
- Submit customer service requests and view original submissions
- Access all properties under one account
- Update their account information, manage mailing addresses, view statements and past assessments

First Time User Set Up

A Taxpayer navigates to <u>https://online.sfassessor.org</u>. There are 3 ways to create an account: create Username / Password; log-in using Facebook; or log-in using Google. This section covers all three ways to sign up into the Community Portal.

Sign up

 The Taxpayer creates a Username / Password by clicking the Log in link, or alternatively by clicking on Contact Us to send message as a guest to our services team, where services requests will generally take 1 to 3 business days to address.



2. The Taxpayer enters *First Name, Last Name, Username* (in email format), *Email, Password* and *Confirm Password*, then clicks the *Sign Up* button.

First Name		
John		
Last Name		
Smlth		
Username		
Johnsmith@ab	c.com	
Emali		
Johnsmith@ab	c.com	
Password		
•••••		
Confirm Password		
•••••		
	Sign Up	

3. After successful login, the Taxpayer is navigated to the Community Portal Home page.

			6
ome	My Details 🗸	Additional Resources 🗸	
		Welcome to the City and County of San Francisco Assessor-Recorder's new web portal	
		On our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage your Business Accounts and Property Locations, as well as create customer support cases. Link Your Business/Property	2
	Properties A	your Business Accounts and Property Locations, as well as create customer support cases.	
	Propert My Pr	your Business Accounts and Property Locations, as well as create customer support cases. Link Your Business/Property Accounts/Businesses	C

Log in using Facebook

1. The Taxpayer can log in using Facebook by clicking the *Facebook* button.

Username		
Password		
Log In to Sandbox		
Remember me		
Forgot Your Password?	Sign Up	
Or log in using:		
Facebook		
& Google		

2. The Taxpayer enters *Email or Phone Number* and *Password*, then clicks the *Log In* button.

Log Into Facebook	- 1
JohnSmith	

Log In	
Forgot account?	
or	
Create New Account	
Not now	

3. The Taxpayer clicks *Continue As...* button.

salesforce
Salesforce.com, inc. will receive: your name and profile picture and email address.
Z Edit This
Continue as JohnSmith
Cancel
This doesn't let the app post to Facebook
Salesforce.com, inc.'s Privacy Policy and Terms

4. After successful login, the Taxpayer is navigated to the Community Portal Home page.

					Θ
Home	My Details 🗸	Additional Resources 🗸			
		On our new web portal, you can your Business Account	County of San Francisco Assessor-Record electronically file your Statements and Exemptions s and Property Locations, as well as create custome Link Your Business/Property	Forms, review and manage	
	Properties	Accounts/Businesses			
		ties Properties I by Property Name • Filtered by All properties - Type, Reco	rd Type • Updated 14 minutes ago		C
	Prop	erty Name 🕇 🗸 🗸	Status 🗸	Account Name	~

Log in using Google

1. The Taxpayer can log in using Google by clicking the *Google* button.

Username			
Password			
	Log In to Sandbox		
Remember me			
Forgot Your Password	1?	Sign Up	
(Or log in using:		
	Facebook		
	& Google		

2. The Taxpayer selects their existing Google account.

G Sign	in with Google			
	Choose	an accou	nt	
	to continue to	salesforce.c	om	
0	JohnSmith@gmai	l.com		
٢	Use another account	t		
langu sales	ontinue, Google will sha uage preference, and pr sforce.com. Before usin sforce.com's privacy p o	rofile picture with ng this app, you (h can review	
				Terms

3. After successful login, the Taxpayer is navigated to the Community Portal Home page.

Home My Details v Additional Resources v Welcome to the City and County of San Francisco Assessor-Recorder's new web portal On our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage your Business Accounts and Property Locations, as well as create customer support cases. Link Your Business/Property Properties Accounts/Businesses Image: Properties My Properties Oitems • Sorted by Properties - Type, Record Type • Updated 14 minutes ago C*						•
On our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage your Business Accounts and Property Locations, as well as create customer support cases. Link Your Business/Property Properties Accounts/Businesses Image: Properties My Properties Oitems • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated 14 minutes ago C*	Home	My Details 🗸	Additional Resources 🗸			
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Property Name 🕈 🗸 V Status V Account Name V				Status 🗸	Account Name	~

Returning User Login and Password Reset

Returning User Login

On subsequent visits, the Taxpayer can follow these steps to log in:

- 1. The Taxpayer goes to <u>https://online.sfassessor.orq</u> in an internet browser.
- 2. The Taxpayer enters *Username* and *Password* that was created during the signup process and clicks the *Log In* button.

AT A COUNTY OF	
Username	
Johnsmith@abc.com	
Password	
Log In to Sandbox	
Remember me	
Forgot Your Password?	Sign Up
Or log in using:	
Facebook	

3. After successful login, the Taxpayer is navigated to the Community Portal Home page.

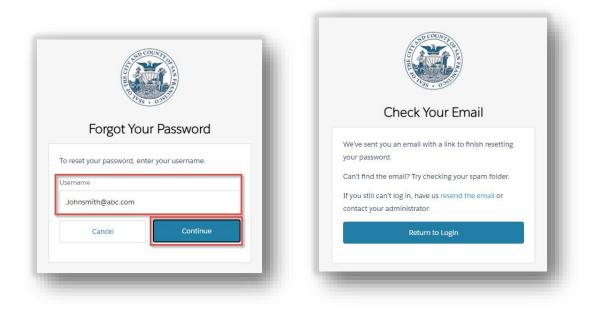
Home My I	Details 🗸	Additional Resources V				
		Welcome to the City and				
		On our new web portal, you ca		ements and Exemptions I s well as create custome	Forms, review and manage	
Properties Accounts/Businesses						
Properties My Properties O items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated 14 minutes ago C						
	Propert	y Name 🕇	✓ Status	~	Account Name	~

Password Reset

1. To reset password, the Taxpayer clicks the *Forgot Your Password?* link on the login page.

Username	
Johnsmith@abc.com	
Password	
Log In to Sandbox	
Remember me	
Forgot Your Password?	Sign Up
Or log in using:	
Facebook	
8• Google	

2. On Forgot Your Password page, the Taxpayer enters their *Username* and clicks *Continue*. The Check Your Email message appears.



3. The Taxpayer locates the email in their inbox and clicks the link provided.

890↑	↓ = S	andbox: Your new SF A:	ssessor Office passwor	- Mes	sage (Plain Text) (7) 🖪	a –		/×/
File Message	Help 🛛 🖓 Tell r	me what you want to	do						
Image: Construction of the ply all the point of the ply all the ply all the plane in the plane									
Delete Respond Quick Steps 🖬 Move Tags 🖬 Zoom 🔺							· ^		
Sandbox: Your new SF Assessor Office password									
noreply@salesforce.com on behalf of San Francisco Assessor Office \bigcirc Reply \bigotimes Reply All \rightarrow Forward \cdots									
SF To Thu 12:00 PM									
1) This message was sent with High importance.									
Hi , Your password has been reset for SF Assessor Office. Go to:									
https://		i/sfassessor/se	ecur/forgotpassword	jsp?					
=00Dr0000001xwt005r0000004FvHUQwKMwoPMDBEcjAwMDAwMDAxeHd0Eg8wMkcxVTAwMDAwMFlIU0gaDzAwNXlwMDAwMDA0RnZl							<u>RnZl</u>		
WiUnbqlzC4SEDwXltrjAR5mSouKCi3cjJYaDFT0fQM8RLLhtcN3jSI5mrV17FDGCjL2-oCw1VKjKI9IQdpvEHHa8HGn_Y6ElfASWvDhaG- WcEO2_b60SJ3HrGzjONVyKaN&display=page&fpot=76ea15b8-a49d-43e7-a1a6-3719bf5ee902cd9768e7-1dda-4868-a1c6-a0ee4eb5502a									
Thanks, Testing sandbo)x - City and County (of San Francisco							
resting sandbu	x - Gry and Wullty I	JI SATI FI ATICISCO							

4. The Taxpayer is navigated to Change Your Password in the Community Portal. The Taxpayer enters *New Password*, adhering to the requirements listed. If an acceptable password is entered, *Good* appears to the right of the password. The Taxpayer enters *Confirm New Password* with the same entry as New Password. If Confirm New Password matches New

Password, *Match* appears to the right of Confirm New Password. The Taxpayer clicks the *Change Password* button.

	Street Street	CONTRACTOR OF CONT	
Ch	ange You	ır Password	ł
Enter a new	password for		
		Make sure to in	nclude at
least:			
	naracters		
 ✓ 1 le ✓ 1 n 			
-	becial character	0	
* New Pass	word		
			Good
* Confirm N	lew Password		
			Match
	Change	Password	

5. After successful password change, the Taxpayer is navigated to the Community Portal Home page.

Home My	v Details 🥆			rancisco Assessor-Reco	rder's new web portal	
				rancisco Assessor-Reco	rder's new web portal	
			ounts and Property Locat	ur Statements and Exemption: tions, as well as create custom usiness/Property	· · · · ·	
	Properties Ac	counts/Businesses				
Properties My Properties O items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated 14 minutes ago C4						C
	Propert	y Name 🕇	✓ Status	`	 Account Name 	~

Navigating Community Portal Home Page

This section explains how to navigate around the Community Portal Home Page.

Upon successful login to the Community Portal, the Home page is displayed. There are three items on the main navigation menu:

- *Home* The Taxpayer clicks here to return to the Home page from anywhere within the Community Portal
- **My Details** Displays menu items that allow the Taxpayer to access their Accounts, Properties, Statements, Assessments, and Cases.
- Additional Resources Displays menu items that allow the Taxpayer to access resources:
 - General Inquiry Allows the Taxpayer to contact Customer Support
 - CCSF Assessor-Recorder Navigates the Taxpayer to the website of the City & County of San Francisco Office of the Assessor-Recorder

ome	My Details 🗸	Additional Resources $$	Main navigation n	nenu	
	Welcom	e to the City and Co	ounty of San Francisco As	sessor-Recorder's new web	portal
		On our new web portal, you	can electronically file your Statements an ounts and Property Locations, as well as c	d Exemptions Forms, review and manage	P
To get sta Business Reque	Account is linked, you will be est a Replacement Pl	to link your Business Accounts and Pro able to see all the associated Properti N	es below. You may also link multiple Accounts and	Access PIN, which can be found on the Notice to File that Properties. equest this by navigating to the Additional Resources tab.	
Inquiry v	vhich will create a customer s	ervice case with our office.			
	sing Additional Infor access additional information		oy clicking on the My Details tab above. There you o	an also view your past filings, assessment history, and any	customer service cases.
			oy clicking on the My Details tab above. There you o Add Account/Property	an also view your past filings, assessment history, and any Click here to add new Accounts or Properties	rcustomer service cases.
You can a	access additional information Statements and Viev	about your Accounts and Properties b	Add Account/Property	Click here to add new	
You can a Filing : To file BP of the Pr operties	access additional information Statements and Viev P statements and/or exempt operties or Accounts linked t Accounts/Businesse	about your Accounts and Properties b ving Property Details ions forms, select the appropriate Prop o view information and request update	Add Account/Property	Click here to add new Accounts or Properties	
You can a Filing ! To file BF of the Pro	access additional information Statements and Viev P statements and/or exempt operties or Accounts linked t Accounts/Businesse roperties ly Properties	about your Accounts and Properties b ving Property Details ions forms, select the appropriate Prop o view information and request update is Tabs di	Add Account/Property perty listed below and choose the File Property Sta isplaying the user's existing Propertie and Accounts/Businesses	Click here to add new Accounts or Properties	system. You can also click on a
You can a Filing : To file BF of the Pr roperties Pr M 4 items • 5	access additional information Statements and Viev P statements and/or exempt operties or Accounts linked t Accounts/Businesse roperties ly Properties	about your Accounts and Properties b ving Property Details ions forms, select the appropriate Prop o view information and request update	Add Account/Property perty listed below and choose the File Property Sta isplaying the user's existing Propertie and Accounts/Businesses	Click here to add new Accounts or Properties	

The menu *My Details* displays menu items that allow the Taxpayer to access the following:

- Businesses/Accounts Navigates to the Taxpayer's current Businesses/Accounts
- **Properties** Navigates to the Taxpayer's current Properties
- *Filings/Statements* Navigates to the Taxpayer's Filings/Statements
- Assessments Navigates to the Taxpayer's Assessments
- **Customer Service Cases** Navigates to the Taxpayer's Customer Service Cases

me My Details ^ A fiditional Resources v Business/Accounts Properties He City and County of San Francisco Assessor-Recorder's new web portal our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage your Business Accounts and Property Locations, as well as create customer support cases. Getting S Customer Service C ur Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent your Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Business Account sinteent you will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed the Input you and access a defile that assess are easily the assess and the assess are easily the assestent on the Response as replacement notice. You may req	ne		Additional Resources V			
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of the Properties or Accounts linked to view information and request updates.					past filings, assessment history, and ar	ny customer service cases.
Accounts/Businesses	You can acce Filing Sta To file BPPs	ess additional information about the standard stan	your Accounts and Properties by clicking on the M Property Details rms, select the appropriate Property listed below a	Add Account/Property		
Properties	You can acce Filing Sta To file BPP s of the Prope	iss additional information about the second se	your Accounts and Properties by clicking on the M Property Details rms, select the appropriate Property listed below a	Add Account/Property		
My Properties	Filing Sta To file BPPs of the Prope	ss additional information about tements and Viewing tatements and/or exemptions for tries or Accounts/Businesses tries	your Accounts and Properties by clicking on the M Property Details rms, select the appropriate Property listed below a	Add Account/Property		

The menu *Additional Resources* displays menu items that allow the Taxpayer to access resources:

ome	My Details 🗸	Additional Resources A		
		General Inquiry		
	Wele	O User Manual		ounty of San Francisco Assessor-Recorder's new web portal
		FAQ		counts and Property Locations, as well as create customer support cases.
		SF Assessor Home Page		
To get st		, k your Business Accounts and Proj ated Properties below. You may als		You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed this year. Once a Busi ultiple Accounts and Properties.
Reque	est a Replacement PIN	cess PIN to view information onlin	e pleas	e request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inqui
	st a replacement Entity ID and Ac r service case with our office.			

- **General Inquiry** Allows the Taxpayer to contact Customer Support. (See Creating a New Customer Case)
- User Manual Provides access to the User Manual for the Taxpayer to use the Community Portal
- FAQ Provide a list of Frequently asked questions and answers for the Taxpayer
- **CCSF Assessor-Recorder** Navigates the Taxpayer to the website of the <u>City & County of San</u> <u>Francisco Office of the Assessor-Recorder</u>.

Filing Business Personal Property Statement

Business property owners must file a business property statement each year detailing the acquisition cost of all supplies, equipment, fixtures, and improvements owned at each location within the City and County of San Francisco. This section details the process of filing a Business Personal Property Statement.

Filing Statements

 A Taxpayer navigates to the Property by clicking the *Property Name* item on the Home page under the *Properties* tab. If the Taxpayer is not on the Home page, the list of Properties is displayed after clicking the *My Details* menu then clicking the *Properties* item. Then, the Taxpayer can click on the *Property Name*.

Filings/Statements our Business Accounts and Property Locations, as v Assessments Getting Si Customer Service C	well as create customer support cases. ut an Entity ID and Access PIN, which can be found on the Notice to File that was mailed may also link multiple Accounts and Properties. thotice. You may request this by navigating to the Additional Resources tab above and above. There you can also view your past filings, assessment history, and any customer rty
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To request a replacement Entity ID and Access PIN to view information online, please request a replacement selecting General Inquiry which will create a customer service case with our office. Accessing Additional Information You can access additional information about your Accounts and Properties by clicking on the My Details tab service cases. Add Account/Prope Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	above. There you can also view your past filings, assessment history, and any customer
selecting General Inquiry which will create a customer service case with our office. Accessing Additional Information You can access additional information about your Accounts and Properties by clicking on the My Details tab service cases. Add Account/Proper Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	above. There you can also view your past filings, assessment history, and any customer
Accessing Additional Information You can access additional information about your Accounts and Properties by clicking on the My Details tab service cases. Add Account/Prope Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	rty
You can access additional information about your Accounts and Properties by clicking on the My Details tab service cases. Add Account/Prope Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose the appropriate Property listed below and choose the property listed	rty
service cases. Add Account/Prope Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	rty
Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	
Filing Statements and Viewing Property Details To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	
To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	e File Property Statements or File Exemptions tab to access our online filing system. You
To file BPP statements and/or exemptions forms, select the appropriate Property listed below and choose th	e File Property Statements or File Exemptions tab to access our online filing system. You
can also click on any of the Properties or Accounts linked to view information and request updates.	
roperties Accounts/Businesses	
Properties	
My Properties	C
3 items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated a minute ago	<u> </u>
Property Name 🕈 🗸 🗸 Status	✓ Account Name ✓
1 Active	
2 Active	

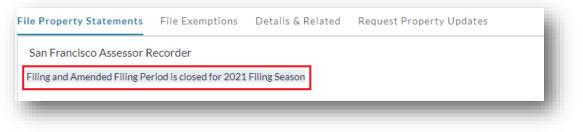
2. The Community Portal displays *File Property Statements* tab by default.

ile Property Statements File Exemptions Details & R	elated Request Property Updates
San Francisco Assessor Recorder	
	Welcome to your Property record.
	Based on your records, you are expected to file:
	BOE-571-L
	File Online
	Request Hardcopy

• The Taxpayer cannot submit statements for inactive property.

File Property Statements File Exemptions Details & Related Request Property Updates	
San Francisco Assessor Recorder Property is Inactive. If you need to update this property, navigate to the 'Request Property Updates' tab.	
	Finish

• The Taxpayer cannot submit statements past the yearly cut-off date. The Taxpayer can continue to submit generic Customer Service requests, and update their information.



The System defaults the type of the taxpayer business and the BOE Form to be filed.

The below table summarizes the types of business and the Form associated with that business type, for Business Personal Properties:

#	Property/Business Type	Form to be filed
1	Business Not Listed Below?	BOE 571-L
2	Financial Institution or Insurance Company	BOE-571-L and BOE-571-LA
3	Apartment	BOE-571-R
4	Short Term Rental	BOE-571-STR
5	Leasing Company	BOE-571-L Leasing
6	Billboard Company	BOE-571-L Billboard
7	Biopharmaceutical Company	BOE-571-L Biopharma

	Our records indicate that this is your first time filing in our new web portal.	
1	Please select your business type below to ensure the correct form is filled out.	
Select Type of Property or Business		
Business Not Listed Below? (BOE 571-L)		* *
Business Not Listed Below? (BOE 571-L)		
Apartment (BOE 571-R) Short Term Rental (BOE 571-STR)		
Leasing Company (BOE 571-L + Leasing Schedule) Billboard Company (BOE 571-L + Billboard Schedule) Biopharmaceutical Company (BOE 571-L + Biotech certification) Financial institution or Insurance company (BOE 571-L + BOE 571-LA)		

3. The Taxpayer can start the filing process, then save the statement to return back to complete the statement at any point of time.

Filing Form BOE-571-L Statement

If the business property is not one of the following: *Financial or Insurance Company, Apartment, Short Term Rental, Leasing Company, Billboard Company, Biotech Company,* then the Taxpayer is required to submit *Form BOE-571-L*. This section details the process of filing your *571-L Business Personal Property* Statement on the Community Portal.

- The Taxpayer navigates to a Property, clicks on *File Property Statements* Tab. *Note:* The System shows the option to file using form *BOE 571-L*
- 2. The Taxpayer clicks *File Online*, then clicks the *Next* button to start filing for the property.

Property			I			
Record Type Business Personal Property	Type Business	Account Name	Entity ID	Doing Business As	Property ID	
File Property Statements	File Exemptions	Details & Related	Request Property Updates			
San Francisco Assessor R	ecorder					
			Welcome to yo	ur Property record.		
				ds, you are expected to file: -571-L	-	
			File Online			
			Request Hardcopy]	
						Next
			_	_	_	

 The Taxpayer can enter *Mailing Address and Remarks* on the *My Property Location* section. Taxpayer is required to enter the *Mailing address* and can click on *Edit* button to enter/make any changes. The Taxpayer clicks the *Next* button to save and proceed to the next section.

operty:							
Supplies	2. Equipment \$0	3. Leased Equipment \$0	4. Construction i \$0	in Progress 5.Lea: \$0	sehold Improvements	6.Alternate Schedule A \$0	Total Reported Cost \$0
My Proper	ty Location	Part I: General Info	Part II: Property B	elonging to You	Part III: Property B	elonging to Others	Submit
Provide your na	me and mailing address						
Name				Mailing Address 🚯			Edit
Business Locatio	n		l				
Property name		-		Roll Code Unsecured			¥
				Unsecured			
emarks							
				1			

Note: The Taxpayer can click on *Print PDF* button to preview and print the statement.

4. The Taxpayer can update any field in the **Part I: General Info** section. All fields marked with a red asterisk (*) are required to continue to the next section. The Taxpayer enters all the required fields and clicks the **Next** button to save & proceed to the next section.

Supplies	2. Equipment \$0	3. Leased Equipment \$0	4. Constructio \$0	n in Progress 5.Lea \$0	sehold Improvements	6.Alternate Schedule A \$0	Total Reported Cost \$0
My Property I		Part I: General Info	_	y Belonging to You	Part III: Property Be		Submit
Part I: General Info omplete (a) thru (g)							
a. Select type of busin				* Select subtype of bu:	siness		
			•				•
* b. Enter local telepho	ne number			* Email address			
Fax Number:							
* c. Do you own the lan	d at this business location?			1			
			•				
* d. When did you start	business at this location?		苗	If your business name of	or location has changed fi	rom last year, enter the former	name and/or location
* e. Enter location of ge (include zip code):	neral ledger and all related acc						
		Edit					
* f. Name of authorized	person to contact at location of	of accounting records		* Telephone number o	f authorized person to co	ntact at location of accounting	g records
	anuary 1, 2020 through Decer or legal entity (corporation, pa						
	cquire a "controlling interest"						
		-					
Remarks							

List of Business Type and SubType

Note: The Taxpayer must populate *Select type of business* and *Select subtype of business*, with available options as shown in the below table.

Business Type	Business Subtype
	Body Shop/Servicing/Repair
	Car Wash
Automotive	Gas/Service Station
	General
	Sales
	Sand/Dirt/Gravel – Retail/Wholesale Suppliers
	Spray Paint Booths
	Biotech

Biotech	General
	Laboratory
	Car Wash
	Dry Cleaning
Cleaning	General
	Janitorial Service
	Laundry – Commercial/Clothes Cleaning Service
	Laundry – Self Operating/Coin Operated
	Batch Plants (Concrete & Asphalt)
Construction	Demolition Contractor
	General
	Sand/Dirt/Gravel – Retail/Wholesale Suppliers
	Advertising
	Amusement Park (Not Theme Parks)
	Billboard
	Billiard Rooms
	Book Binding
	Bowling Alley
	Cable
	Cell Towers (Including Equip Sheds, Pads, Fences)
	Cell Towers (Tenants' Equipment)
Entertainment/ Media/ Communications	General
	News Publisher
	Offset Lithographic Printing Press
	Photo Labs – Commercial
	Photo Labs – One Hour
	Post-Presses
	Pre-Presses
	Presses
	Radio/TV Broadcasting
	Satelite Dishes (Residential)
	Telephone & Communications

	Theater
	Theme Parks
	Bakery
	Bottling Plants (Other Than Breweries)
	Breweries
	Food Processing
Food Services	General
	Grocery/Supermarket
	Warehousing
	Winery
	Biotech
	Convalescent Care
	Dental Lab
	Drug/Pharmaceutical Mfg
	General
Health	Health Clubs/Gyms
	Laboratory
	Medical/Dental
	Pharmacy And Drug Store
	Veterinary Hospital
Leasing	-None-
	Apartment
Lodging	General
	Hotel
	Short Term Rental
	Batch Plants (Concrete & Asphalt)
	Brick, Sewer Pipe, Terra Cotta or Tile Manufacturing
	Canneries
	Cement Manufacturing
	Chemicals and Allied Product Mfg
	Circuit Board Mfg
	Cogeneration (Power Plants)

	Dental Lab
Manufacturing	Drug/Pharmaceutical Mfg
	Electronic Equipment Manufacturing
	Food Processing
	General
	Ice Plant
	Laboratory
	Semiconductor
	Sugar & Sugar Product Manufacturing
Non-Profit	-None-
Organizations	General
	School or Instructional Institution
	Banking/Financial Institution
	Cable
	Dry Cleaning
	Financial Services
	Floor Covering and Installation Services
	Gas/Service Station
Other Services	General
	Insurance Services
	Janitorial Services
	Laboratory
	Mortuaries
	Recyclers
	Telephone & Communication
	Book Binding
	General
	Offset Lithographic Printing Press
	Photo Labs – Commercial
Printing	Photo Labs – One Hour
	Post-Presses
	Pre-Presses

	Presses
	Building/Parking Management
Property Management	General
	Janitorial Service
	General
Retail/Wholesale	Pharmacy and Drug Store
	Sand/Dirt/Gravel Supplier
	Warehousing

5. The Taxpayer completes *Part II: Property Belonging to You* section. The Taxpayer can click the *Upload Files* button to attach any relevant documentation to this filing. The Taxpayer can also provide the details of the assets owned by them and any improvements they might have done to the property by clicking on the *New* button.

571-L: Busin	ess Personal Pr	operty Statement				
Property:						
1. Supplies \$0	2. Equipment \$0	3. Leased Equipment \$0	4. Construction in Progress \$0	5.Leasehold Improvements \$0	6.Alternate Schedule \$0	A Total Reported Cost \$0
My Property	Location	Part I: General Info	Part II: Property Belonging to You	Part III: Property	Belonging to Others	Submit
Part II: Declaratio	n of Property Belongi	ng to You				
Cancel button will restore t	he list to when it was last saved.		ler to move on to the next page of the fo			iously reported. Click Save to save changes; change it's cost to \$0. If applicable, details
Compare to Last Year's A	ssessed Costs					
Cancel Save M	New					
Add attachment Upload Files Or	drop files					
You are still required to ent	er individual asset line items ever	n if you upload a file. Uploading a file is m	eant to provide additional information i	fneeded.		
Asset Classification	Acquisition Year	Property Categor	y Last Year's Asse	sed Cost This	Year's Reported Cost	Description of This Year's Reported Cost
Cancel Save	New					
Remarks						
			Back Next Print PDF			

	Upload Files	
Valuation.xlsx xLS 11 KB		• •
1 of 1 file uploaded		Done

6. If the Taxpayer reported assets in previous assessment years, then all previously assessed assets are displayed by default. The Taxpayer can make necessary changes and click *Save* to save them. The Taxpayer can change *This Year's Reported Cost* to zero, if the asset no longer applies.

Below for your convenience, please find Cancel button will restore the list to wh related to recent acquisitions or disposa	en it was last saved. When finished, click Is will be entered in the Schedule D in Pa	xe a change, please click on the pencil icor Save and Next in order to move on to the rrt II, before you proceed to Part III.			
Compare to Last Year's Assessed Cost Cancel Save New	2				
Add attachment Upload Files Or drop files You are still required to enter individual	asset line items even if you upload a file.	Uploading a file is meant to provide addi	tional information if needed.		
Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
		Bldg/Bldg Impr/Leasehold			
Leasehold Improvements - Structure	2019	Impr/Land/Land Impr	\$13,180	\$13,180 💉	. dat
	2019 / 2019 /		\$13,180 \$20,081	\$13,180 ×	1
Machinery & Equipment	-	Impr/Land/Land Impr			
Machinery & Equipment Office Furniture & Equipment	2019	Impr/Land/Land Impr Equipment	\$20,081	\$20,081 🖋	1
Leasehold Improvements - Structure Machinery & Equipment Office Furniture & Equipment Supplies Cancel Save New emarks	2019 ×	Impr/Land/Land Impr Equipment Equipment	\$20,081	\$20,081 /	1

7. To add a new asset(s) to the filing, the Taxpayer can click the *New* button under *Asset Classifications*. This displays a popup to enter *Asset Classification*, *Acquisition Year* and the *Cost* of the new asset. The Taxpayer enters all fields marked with a red asterisk (*) and clicks the *Save* button.

	Create Statement Reported Asset
Form	BOE-571-L-Business Property Statement
*Asset Classification	Counterlines Partitions, Cafeteria Equipment, etc.
* Acquisition Year	2021
*Cost 🔕	\$5,000.00
Description	Oven
Cancel Save	

8. The Taxpayer can click on the pencil icon to make any changes to assets and click the *Save* button. The Taxpayer can click *Cancel* to revert the changes.

Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Rep Cost	ported
Counterlines, Partitions, Cafeteria Equipment, etc.	2020	Alternate Schedule A		5000	Oven	. select
Leasehold Improvements - Structure	2019	Bidg/Bidg Impr/Leasehold Impr/Land/Land Impr	\$13,180	\$13,180 🖋		. cont
Machinery & Equipment	2019	Equipment	\$20,081	\$20,081 🖋	FOOD PROC	A.M.
Office Furniture & Equipment	2019	Equipment	\$5,000	\$5,000 🖋		A.M.
Supplies	2019	Supplies	\$500	\$500 🖋		

9. If there are no assets to declare, the Taxpayer clicks the certification check box before clicking the *Next* button to proceed.

571-L: Busi	ness Personal P	roperty Statemen	it			
Property:						
1. Supplies \$0	2. Equipment \$0	3. Leased Equipment \$0	4. Construction in Progress \$0	5.Leasehold Improvements \$0	6.Alternate Schedule A \$0	Total Reported Cost \$0
My Proper	ty Location	Part I: General Info	Part II: Property Belonging to You	Part III: Property Be	longing to Others	Submit
Part II: Declaration	n of Property Belonging t	o You				
			the pencil icon beside any asset to edit the value shed, click Save and Next in order to move on to t			
item, click on the pencil to o	change it's cost to \$0. If applicable, de	tails related to recent acquisitions or dispos	sals will be entered in the Schedule D in Part II, be	efore you proceed to Part III.		
Compare to Last Year's A	ssessed Costs					
Cancel Save I	New					
Add attachment						
	drop files					
	er individual asset line items even if y	rou upload a file. Uploading a file is meant to	provide additional information if needed.			
Asset Classification	Acquisition Year		asing -1 Cost This Year's Re	Description of	This Year's	
Asset Classification	Acquisition real	Property Category L	The Taxpayer must either	Reported Cost		
Cancel Save	New		an Asset or click the certific button that there are no ass	cation		
Remarks			declare.	Sets to		
		Back Next	Print PDF			
			-			

10. The Taxpayer is required to complete *Schedule D*, if Leasehold Improvements assets (Fixtures or Structures) are entered in *Part II: Property Belonging to You* section.

plies		3. Leased Equipment \$0	4. Construction in Pr \$0	5.Leasehold Improv \$13,502	ements 6.Alternate Schedule A \$123	Total Reported Cost \$39,206
My Property Location	Part I: General Info	Part II: Prope	rty Belonging to You	Part II - Schedule D	Part III: Property Belonging to Ot	Submit
I - Schedule D					-	
	d					
You have reporte	d a cost of \$13,181.00 in Leasehold In	nprovements - Structure	with acquisition year 2019	for a Net change of \$1.00.		
lease click here to provid	e more information of the Acquisitions	or Disposals that caused t	his change.			
New						
Туре	Month of Addition/Disp	oosal Year of	Addition/Disposal	Cost	Description	
Туре	Month of Addition/Disp	posal Year of	Addition/Disposal	Cost	Description	
	Month of Addition/Disp				Description	
∽ You have reporte	d a cost of \$321.00 in Leasehold Impr	rovements - Fixtures with	acquisition year 2020 for a		Description	
∽ You have reporte		rovements - Fixtures with	acquisition year 2020 for a		Description	
∽ You have reporte	d a cost of \$321.00 in Leasehold Impr	rovements - Fixtures with	acquisition year 2020 for a		Description	
V You have reporte	d a cost of \$321.00 in Leasehold Impr	ovements - Fixtures with	acquisition year 2020 for a		Description	
You have reporte lease click here to provid New	d a cost of \$321.00 in Leasehold Impr	ovements - Fixtures with	acquisition year 2020 for a	Net change of \$321.00.		
You have reporte lease click here to provid New	d a cost of \$321.00 in Leasehold Impr	ovements - Fixtures with	acquisition year 2020 for a	Net change of \$321.00.		
You have reporte lease click here to provid New	d a cost of \$321.00 in Leasehold Impr	ovements - Fixtures with	acquisition year 2020 for a	Net change of \$321.00.		

11. The Taxpayer can click the **New** button and enter each of their acquisitions and disposals related to the **Leasehold Improvements** entered in Part II. The Taxpayer enters all fields marked with a red asterisk (*) in the popup window and clicks the **Save** button.

	Edit Reported Asset Schedule
*Туре	Addition
*Addition/Disposal Month	January
Addition/Disposal Year	2020
*Cost	\$10,000.00
*Description	Leasehold Improvements done
Cancel Save	

12. The Taxpayer can update the Schedule line items by clicking on the pencil icon. The Taxpayer completes Schedule D and clicks *Next* button to continue with the filing.

Note:

- The *Next* button is enabled only if the net change reported for each asset is equal to the total cost of *Additions and Disposals* for that asset.
- The Taxpayer cannot delete an *Addition/Disposal* line item. The Taxpayer can change the *Cost* to zero, if added by mistake.
- The net total of *Addition/Disposal* should be equal to the *Cost* entered for the Leasehold Improvement entered in *Part II: Property Belongings to You* section.

New					
Туре	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
Addition	January	2020	\$10,000	Leasehold Improvements done	
V You have reported	a cost of \$50,000.00 in Leasehold Improvement	s - Fixtures with acquisition year 2020 f	or a Net change of \$50,000.00.		
	a cost of \$50,000.00 in Leasehold Improvement Month of Addition/Disposal	s - Fixtures with acquisition year 2020 f	or a Net change of \$50,000.00.	Description	
New				Description // // // // // // // // // // // // //	
New	Month of Addition/Disposal	Year of Addition/Disposal	Cost		

13. All businesses that are leasing assets from other leasing companies can report the leased assets under *Part III: Property Belonging to Others section*. The Taxpayer can click the *Upload Files* button to attach any relevant documentation to this filing and click *New* button to report the assets leased. If there are no leased assets leased from Lessors to declare, the Taxpayer must click the certification check box and click *Next* to proceed to the next step.

operty:			l			
l. Supplies 500	2. Equipment \$25,081	3. Leased Equipment \$0	4. Construction in Progress \$0	5.Leasehold Improvements \$13,180	ó.Alternate Schedule A \$5,123	Total Reported Cost \$43,884
My Prope	rty Location	Part I: General Info	Part II: Property Belonging to You	Part III: Property Bel	onging to Others	Submit
t III: Declara	tion of Property Belor	nging to Others				
operty belonging to	others, or their business entities	, is located on your premises, report the o	wner's name and mailing address. If it is	eased equipment, read your agre	ement carefully and enter A (Le	essor) or B
ee), and whether le idually by clicking '		ion. For assessment purposes, the Assess	or will consider, but is not bound to, the o	contractual agreement. You may e	ither upload a file or enter the	items
ancel Save	New					
	New					
lattachment	New Or drop files					
attachment						
d attachment ① Upload Files		Leased Equipment Type Year	of Acq. Cost to Purch	use Annual Rent	Description	_
d attachment	Or drop files Tax Obligation	Leased Equipment Type Year	The Taxpayer must add	a	Description	-
d attachment 1 Upload Files	Or drop files	Leased Equipment Type Year	The Taxpayer must add Lessor's Name or click th	a ie	Description	-
I attachment	Ordrop files Tax Obligation		The Taxpayer must add Lessor's Name or click th certification button that the	a ne ere	Description	-
attachment Upload Files ssor's Name Cancel Save I certify that I have	Or drop files Tax Obligation		The Taxpayer must add Lessor's Name or click th	a ne ere	Description	-
d attachment	Ordrop files Tax Obligation		The Taxpayer must add Lessor's Name or click th certification button that the	a ne ere	Description	
attachment Upload Files ssor's Name Cancel Save I certify that I have	Ordrop files Tax Obligation		The Taxpayer must add Lessor's Name or click th certification button that the	a ne ere	Description	
attachment	Ordrop files Tax Obligation		The Taxpayer must add Lessor's Name or click th certification button that the	a ne ere	Description	

14. Upon clicking *New* button, Taxpayer enters all fields in the *Create Statement Reported Assets* popup window and clicks *Save*. All fields marked with a red asterisk (*) are required.

	Create Statement Reported Asset
Form	BOE-571-L-Business Property Statement
Property Category	Leased Equipment
Leased Equipment Type	None
*Asset Classification	Counterlines, Partitions, Cafeteria Equipment, etc.
Lessor's Name	
Lessor's Mailing address	
Tax Obligation	
Acquisition Year	None •
Manufacture Year	
Description	
Leased Number	
• Cost	\$1000.00
Annual Rent	
Caliker Jave	

15. The Taxpayer enters all assets belonging to others and clicks *Next* button to proceed to the next section.

operty:						
Supplies 500	2. Equipment \$25,081	3. Leased Equipment \$1,000	4. Construction in Progress \$0	5.Leasehold Improvements \$13,180	6.Alternate Schedule A \$5,123	Total Reported Cost \$44,884
My Property Lo	ocation	Part I: General Info	Part II: Property Belonging t	You Part III: Property Be	elonging to Others	Submit
t III: Declaratio	n of Property Belong	ging to Others				
operty belonging to othe	rs, or their business entities, is l	located on your premises, report the owr	ner's name and mailing address. I	it is leased equinment, read your ago	ement carefully and enter A (I e	essor) or B (Lessee), and whether less
		re Assessor will consider, but is not bound				
	w					
ttachment	w					
attachment	w					
attachment						
attachment L Upload Files Or d		Leased Equipment Type	Year of Acq.	Cost to Purchase	Annual Rent	Description
attachment Upload Files Or d soor's Name	Tax Obligation	Leased Equipment Type				
attachment Upload Files Or d soor's Name	rop files	Leased Equipment Type		Cost to Purchase \$1,000		Description
attachment	Tax Obligation	Leased Equipment Type				
attachment Upload Files Or d sor's Name	Tax Obligation	Leased Equipment Type				
ittachment Upload Files Or d sor's Name	Tax Obligation	Leased Equipment Type				
attachment Upload Files Or d sor's Name	Tax Obligation	Leased Equipment Type				
attachment Cypload Files Or d Sov's Name ancel Save Ne	Tax Obligation	Leased Equipment Type				

16. The Taxpayer provides signature information (fields marked with a red asterisk (*) are required) and clicks the *Submit* button.

operty:							
Supplies 500	2. Equipment \$25,081	3. Leased Equipment \$1,000	4. Constructio \$0		5.Leasehold Improvements \$13,180	6.Alternate Schedule A \$5,123	Total Reported Cost \$44,884
My Propert	y Location	Part I: General Info	Part II: Propert	y Belonging to You	Part III: Property Bel	onging to Others	Submit
gn & Submit							
		State of California that I have examined th					
.e, correct, and comp	lete and includes all property re-	quired to be reported which is owned, clai	med, possessed, cont	trolled, or managed b	by the person named as the Asse	ssee in this statement at 12:01 a	.m. on January 1, 2021.
Signature of assessee	or authorized agent			* Date 🚯			
Name of Assessee or	Authorized Agent			* Title of Assess	ee or Authorized Agent		
Name of Legal Entity				Federal Employe	r ID Number		
Preparer's Name and	Address			* Title of Prepar	er		
Felephone Number				Business Descrip	tion		•
							•
			•	Remarks			
vnership Type							
			•		IT IS SUBJECT TO AUDIT		

17. The Community Portal displays the completed certification. The Taxpayer can click *View Statement* link to view the detailed statement. The Taxpayer can click *Print* link to print the certificate (or) to save a copy for later reference.

	İ	
Certification Complete	н	
Thank you for electronically filing. Listed below is your confirmation number.		
Statement Type: BOE-571-L - Business Property Statement Property II: Confirmation Number: Date of Submission: 11/19/2021 9:11 AM	l	
You may view your e-Filed statement by clicking "View Statement" below.		
Home Print View Statement	l	

18. The Taxpayer receives an email informing them of their filing along with details related to the statement.

Thu 11/5/2020 10:49 PM noreply@salesforce.com on behalf of NoReply.Ass Sandbox: The San Francisco Assessor-Recorder Office Has Re	
	THE COUNTROL STORE
	Statement Type: BOE-571-L - Business Property Statement Property Id: Image: Confirmation Number: Date of Submission: 11/19/2021 9:11 AM

Filing Form BOE-571-R for Business Apartment Property

If the property is a Residential Rental Property (that collects transient occupancy taxes or engages in property rental activity), the Taxpayer is required to file *Form BOE-571-R* for that property. This section details the process of filing *BOE-571-R Apartment House Property Statement* on the Community Portal.

 The Taxpayer navigates to the Property (Apartment), clicks on *File Online* link under *File Property Statements* tab, and then clicks the *Next* button to start the filing.

Note: The System shows the option to file using form Apartment (BOE 571-R)

2. The Taxpayer navigates to the form. The Taxpayer reads the instructions and clicks the *Next* button.

•	ons info/address	PART II: QUESTIONS UNIT TOTALS SCHEDULES A AND B DECLARATION BY ASSESSEE	
RUCIN	UNS INFO/ADDRESS		
		BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT INSTRUCTIONS	
	nue and Taxation Code	State of California requires that every person, upon request of the Assessor, shall file a written property statement under penalty of perjury with the Ass	essor
ossesse	d or controlled by you a	appoint. Please complete this form according to the numbered instructions provided below as your statement of furnishings and related equipment own 12:01 a.m., January 1, this year at the location listed. Property which you are purchasing under a conditional sales contract must be included. Return the sessor on or before the date stated in the official requirement section. In all instances, you must return the original BOE-571-R.	ed,
ossesse omplete	d or controlled by you a	appoint. Please complete this form according to the numbered instructions provided below as your statement of furnishings and related equipment own 12:01 a.m., January 1, this year at the location listed. Property which you are purchasing under a conditional sales contract must be included. Return the	ed,
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3. The Taxpayer must provide information marked with a red asterisk (*) on all sections. The Taxpayer completes each section and clicks *Save* to save the contents. The Taxpayer clicks the *Next* button to save and proceed to the next section (or) *Previous* button to save and go to the previous section. The Taxpayer can click *Print PDF* button at any time to preview the data entered so far in a PDF format.

Note: Navigating to a different section by clicking on the section name in the status bar does not automatically save the form content. The Taxpayer has to click **Save, Next** or **Previous** to actually save the contents entered so far.

ccounting Unit Type	Accounting Unit Number	
None	\$	
Accounting City	* Accounting State	
SAN FRANCISCO	California	\$
Accounting Postal Code	Accounting Postal Code Extension	
94104		
Accounting Country		
United States of America	\$	
nter name and telephone number of authoriz	d person to contact at location of accounting records:	
nter name and telephone number of authoriz	d person to contact at location of accounting records:	
inter name and telephone number of authoriz	d person to contact at location of accounting records:	Next >

4. The Taxpayer enters mailing address, location address details on the **Info/Addresses** section, then clicks the **Next** button.

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5. The Taxpayer enters all fields in *Part II: Questions* section, then clicks the *Next* button.

CAREFULLY READ AND FOLLOW THE ACCOMPANYING IN:	BOE-571-R: APARTMENT HOU STRUCTIONS	SE PROPERTY STATEME	NI
l. If you no longer own this property as of January 1 of t Name	his year, show the name and maili	ng address of the new owne	r.
Mailing Address			
City	State		Zip
Zip Extension	None	~	
Lip Extension			
2. Enter the total number of units for the location liste	d	• Do you live in one of the u	
10		No	~
entity? None-			~
4. Do any other individuals, partnerships or corporations do business or own personal property (other than household furniture and personal effects of			
No voir tenants) located on your premises?			
others on a loan, rental, or lease basis?			
5. Do you hold furniture or equipment belonging to others on a loan, rental, or lease basis? No	rnished (e.g., stoves and refrigera	tors, not built-in), and unfur	nished units. Also complete Schedule A of the back. Do
others on a loan, rental, or lease basis? No 5. ENTER BELOW the number of fully furnished, partly fu	rnished (e.g., stoves and refrigera ch you live.	tors, not bullt-in), and unfur	nished units. Also complete Schedule A of the back. Do
others on a loan, rental, or lease basis? No 6. ENTER BELOW the number of fully furnished, partly function of include, either here or in Schedule A, any unit in whe Sleeping Room	rnished (e.g., stoves and refrigera ch you live. Partially Furnished	tors, not built-in), and unfur	
others on a loan, rental, or lease basis? No S. ENTER BELOW the number of fully furnished, partly function of fully furnished, partly function fundude, either here or in Schedule A, any unit in who Sleeping Room	ich you live.	tors, not built-in), and unfur	nished units. Also complete Schedule A of the back. Do Unfurnished
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STRUCTIONS I	PART II: QUESTIONS	UNIT TOTALS SCHEDULES A AND B DECLARATION BY ASSESSEE	
		BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT	
Unit Totals			
Total Sleeping Ro	oom		
2			
Total Studio			
2			
Total One Bed			
2			
Total Two Bed			
2			
Total Three Bed			
2			
Total Larger			
0			
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6. The Taxpayer checks the totals in *Unit Totals* section, then clicks the *Next* button.

7. The Taxpayer reads the instructions and completes *Schedule A and B* section. The Taxpayer clicks on *Reported Assets (Furniture and Appliances)* and *Reported Assets (Other Furniture & equipment)* buttons to add reported assets. The Taxpayer enters *Year of Acquisitions* and *Original Installed Cost*, then clicks the *Save* button.

Schedule A - Furniture and Appliances Action * Year of Acquisition * Original installed Cost (NOT depreciated book value) Furniture and Equipment Action * Year of Acquisition * Original installed Cost (NOT depreciated book value) Schedule B - Other Furniture and Equipment Action * Year of Acquisition * Original installed Cost (NOT depreciated book value) Chemical Schedule B - Other Furniture and Equipment Action * Year of Acquisition * Original installed Cost (NOT depreciated book value) Other Furniture and Appliances Withermarks Schedule A - Furniture and Appliances Action * Year of Acquisition Original Installed Cost (NOT depreciated book value) Other Furniture and Appliances Withermarks Schedule A - Furniture and Appliances Action * Year of Acquisition Original Installed Cost (NOT depreciated book value) Schedule A - Furniture and Appliances Action * Year of Acquisition Original Installed Cost (NOT depreciated book value) Schedule A - Furniture and Appliances Action * Year of Acquisition Original Installed Cost (NOT depreciated book value) Schedule A - Furniture and Appliances Action * Year of Acquisition Original Installed Cost (NOT depreciated book value) Schedule A - Furniture and Appliances - Total Cost Schedule A - Furniture and Appliances - Total Cost Schedule A			
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Action * Year of Acquisition * Original Installed Cost (NOT depreciated book value) Action * Year of Acquisition * Original Installed Cost (NOT depreciated book value) Schedule B - Other Furniture and Equipment Action * Year of Acquisition * Original Installed Cost (NOT depreciated book value) Deter Furniture Equipment - Total Cost BOO Remarks My Remarks My Remarks Schedule A - Furniture and Appliances Compared Total Cost	SCHEDULE B. Complete the schedule as instructed. Inc separately, you may do so.	clude all equipment not reported in Schedule A. If you c	are to attach a schedule listing types of equipment
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	Furniture and Appliances - Total Cost \$0.00		

8. After entering all Reported Assets, the Taxpayer clicks the *Save* button at the bottom of the page to save the reported assets and update totals. The Taxpayer clicks *Next* button to proceed to the next section.

			+ Reported Assets (Furniture and Appliances)
Action	* Year of Acquisition	* Original Installed Cost (NOT de	apreciated book value)
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🖉 🛍	2010	\$5,000.00	
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Action	• Year of Acquisition 2020	* Original Installed Cost (NOT d	updated Total Reported Assets (Other Furniture & Equipment) apreciated book value) Press Save button on bottom left to see

9. The Taxpayer signs and submits the form by clicking the *Submit* button on *Declaration of Assessee* section.

Note: All sections need to be completed to submit the statement.

BOE-571-R: APARTN	IENT HOUSE PROPERTY STATEMENT
Note: The following declaration must be con	npleted and signed. If you do not do so, it may result in penalties.
	mined this property statement, including accompanying schedules, statements or other attachments, and to the y required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as
* Ownership Type	
Other 🗘	
If Ownership Type = Other, enter the Ownership Type here:	
Other Owner	
* Signature of Assessee or Authorized Agent	Date
Signature of Person Making Claim	The Signature Date will be populated upon submission.
* Name of Assessee or Authorized Agent	Title
* Name of Legal Entity (other than DBA)	Federal Employer ID number
	Enter FEIN (also known as Tax ID). Please do not enter SSN.
* Preparer's Name and Address	* Telephone Number
Remarks	
My Remarks	
THIS STATEMENT IS SUBJECT TO AUDIT	
	Submit
Save Print PDF	Previous

10. A completion certificate is issued to the Taxpayer. The Taxpayer can click *View Statement* link to view the detailed statement. The Taxpayer can click *Print* link to print the certificate (or) to save a copy for later reference.

	Frification Complete (filing. Listed below is your confirmation number.
Property Id: Confirmation Number: Date of Submission:	BOE-571-R - Business Apartment Statement October 29, 2020 statement by clicking "View Statement" below.
<u>Home</u>	Print View Statement

11. The Taxpayer receives an email informing them of their filing along with details related to the statement.

Thu 11/5/2020 10:19 PM noreply@salesforce.com on behalf of NoReply.As Sandbox: The San Francisco Assessor-Recorder Office Has R	
	THE COUNTROL TO THE
	Statement Type: BOE-571-R - Business Apartment Statement Property Id: Confirmation Number: Date of Submission: 11/6/2020 6:18 AM

Filing Form BOE-571-STR for Short Term Rental Property

If the property is a Short Term Rental property, you are required to file *Form BOE-571-STR*. This section details the process of filing *BOE-571-STR Short Term Rental Property Statement* on the Community Portal.

1. The Taxpayer navigates to the Property (Short Term Rental property), clicks on *File Online* link within *File Property Statements t*ab and then clicks the *Next* button to start filing.

Note: The System shows the option to file using form Short Term Rental (BOE 571-STR)

File Property Statements File Exemptions Details & Related	Request Property Updates
	Welcome to your Property record.
	Based on your records, you are expected to file: BOE-571-STR
	<u>File Online</u>
	Request Hardcopy
	Next

2. The Taxpayer navigates to the form. The Taxpayer completes all sections of the form.

•					
INFO/ADDRESSES	PART 1	PART 2	SCHEDULE A	PART 3	SIGNATURE
			BOE-571-STR: S	HORT-TERM R	ENTAL PROPER
				ASS	SESSOR-RECORDE
			SHOR	T TERM RENTAL	PROPERTY STATEM
			c	CITY & COUNTY O	F SAN FRANCISCO
					 askbpp@sfgov
			DECLARATION OF C	COSTS AND OTHE	• askbpp@sfgov R RELATED PROPERT
General Inform	ation		DECLARATION OF C	COSTS AND OTHE	
General Inform	ation		DECLARATION OF C	COSTS AND OTHE	
General Inform	ation		DECLARATION OF C	COSTS AND OTHE	
	ation	_	DECLARATION OF C	COSTS AND OTHE	R RELATED PROPERT
Entity Name	ation		DECLARATION OF C	COSTS AND OTHE	R RELATED PROPERT
	nation		DECLARATION OF C	COSTS AND OTHE	R RELATED PROPERT
Entity Name	nation		DECLARATION OF C	COSTS AND OTHE	R RELATED PROPER

3. The Taxpayer must provide information marked with a red asterisk (*) on all sections. Taxpayer completes each section and clicks *Save* to save the contents. Taxpayer clicks the Next button to save and proceed to the next section (or) *Previous* button to save and go to the previous section. Taxpayer can click *Print PDF* button to preview and print the statement.

Note: Navigating to a different section by clicking on the section name in the status bar does not automatically saves the form content. The Taxpayer has to click **Save, Next** or **Previous** to actually save the contents entered so far.

	PART 1	PART 2	SCHEDULE A	PART 3	SIGNATURE			
			BOE-571-STR: S	HORT-TERM F	RENTAL PROPERTY STATI	EMENT		
Part 2: Proper	ty							
* 3a. Do you own	the land used at	this short term ren	tal property location?					
None								;
* 3b. Do you own located at your sh			old furniture and perso	nal effects)				
None				*				
	Print PDF						Previous	Next ▶

4. The Taxpayer signs and submits the form by clicking the *Submit* button.

	BOE-571-STR: SHORT-TERM RENTAL PROPERTY STA	ATEMENT
	of California that I have examined this property statement, including acc omplete and includes all property required to be reported which is owne 1, 2021.	
Owner	Date	1 THIS STATEMENT SUBJECT TO AUDIT
gnature of Assessee or Authorized Agent	The Signature Date will be populated upon submission.	
Name of Assessee or Authorized Agent	Date	
	10/27/2020	
Preparer's Name and Address	Date	
HIS STATEMENT IS SUBJECT TO AUDIT		

5. A completion certificate is issued to the Taxpayer. The Taxpayer can click *View Statement* link to view the detailed statement. The Taxpayer can click *Print* link to print the certificate (or) to save a copy for a later reference.

Certification Complete	
Thank you for electronically filing. Listed below is your confirmation number.	
Statement Type: BOE-571-STR - Short-Term Rental Property Statement Property Id: Confirmation Number: Date of Submission: October 27, 2020	
You may view your e-Filed statement by clicking "View Statement" below.	
Home Print View Statement	

6. The Taxpayer receives an email informing them of their filing along with details related to the statement.

To	Thu 11/5/2020 10:31 PM noreply@salesforce.com on behalf of NoReply.Assessor-Recorder@sfgov.org Sandbox: The San Francisco Assessor-Recorder Office Has Received Your Filed Statement					
		AND COUNTY OF THE REAL OF THE				
		Statement Type: BOE-571-STR - Short-Term Rental Property Statement Property Id: Confirmation Number: Date of Submission: 11/6/2020 6:30 AM				

Filing Form BOE-571-L Biopharma for Biopharmaceutical Company

If the property/business is a *Biopharmaceutical/Biotech Company*, the Taxpayer is required to submit *Form BOE-571L + Biotech Certification*. This section details the process of filing **571-L – Biopharma Business Personal Property** Statement on the Community Portal.

 The Taxpayer navigates to the Property (Biopharmaceutical Company), clicks on *File Online* link within *File Property Statements* tab. The Taxpayer clicks *File Online*, then clicks the *Next* button to start filing for the property. Clicking *Next* creates the 571-L Biopharma statement.

Note: The System shows the option to file using form *Biopharmaceutical Company (BOE 571-L + Biotech Certification)*

San Francisco Assessor F	Recorder		
		Welcome to your Property record. Based on your records, you are expected to file: BOE-571-L - Biopharma	
		<u>File Online</u>	
		Request Hardcopy	
			Next

2. During the filing of the **571-L** – **Biopharma Statement**, the Taxpayer selects **Business Type** as **Biotech** and the appropriate subtype of business in the **Part I: General Info** section of the form.

operty:						
Supplies 0.00	2. Equipment \$0.00	3. Leased Equi \$0.00	pment	4. Construction in Progr \$0.00	ess 5.Leasehold Improvements \$0.00	Total Reported Cost \$0.00
My Property Location		Part I: General Info	Part II: Property	Belonging to You	Part III: Property Belonging to Others	Submit
Part I: General Information omplete (a) thru (g)	1			t Calastauktura a filozi		
omplete (a) thru (g)	1			* Select subtype of busi	ness	
omplete (a) thru (g)	1		•	* Select subtype of busi	ness	
omplete (a) thru (g) * a. Select type of business			•	* Select subtype of busi	ness	•)
omplete (a) thru (g) * a. Select type of business			×		ness	
			¥	None	ness	

- 3. The Taxpayer completes *My Property Location, Part 1, Part II and Part III* sections of the form. Refer to <u>Filing Form BOE-571-L and BOE-571-LA for Financial/Insurance Company</u> for detailed steps.
- 4. The Taxpayer completes Biopharma Certification, Signs and Submits. *Note: Biopharma Certification* is required when filing for the first time.

upplies 10	2. Equipment \$0.00	3. Leased E \$0.00	quipment	4. Construction in Pr \$0.00	ogress	5.Leasehold Improvements \$0.00	Total Reported Cost \$0.00		
My Property Loc	ation	Part I: General Info	Part II: P	roperty Belonging to You	Part III: Pr	roperty Belonging to Others	Submit		
		:	TATE BOAF	RD OF EQUALIZATI	ON				
		QUALIFICATIONS	FOR A BIOPHARM	ACEUTICAL INDUSTRY EQUIF	PMENT AND FIX	TURES			
ow. Instructions for repor	ting the specific types of pro		delines (AH 581) o	n the Business Property Stater	nent (571-L). The	San Francisco County Assessor's O	xtures that meet the criteria as defined ffice requests that you <u>notify us if your</u>		
The State Board of Equali	zation defines the qualifying	biopharmaceutical industry equip	ment and fixtures a	s follows:					
and/or provide products I	or human or animal therapeu	in support of, research and/or mar tics, diagnostics, and/or vaccines eting the above criteria as descrit	-				r, or molecular components, to discover		
Form 571-L Category			iption						
Schedule A									
Column 1 - Machinery &	Equipment	Gene	ral Laboratory Equi	ipment and High Tech Analytica	al Instruments				
Column 3 - Other Equip	ment	Com	Commercial Manufacturing Equipment						
Column 4 - Tools, Dies, J	igs	Pilot	Scale Manufacturin	ig Equipment					
Schedule B									
Column 2 - Fixtures		Fixtu	res and Process Pip	ing					
A sample listing of the equ	ipment and fixtures covered	by LTA 99/54 is attached							
Firm Name				Account No.					
ets the State Board of Eq	ualization's criteria for biopl	narmaceutical industry equipmen	t and fixtures for it	ts property located in San Fran	cisco County and	d requests assessment as a biophar	maceutical firm.		
gnature of Person Making (laim								

	Hi-tech Analytical Instruments
Analytical Balances	Cell Fusion Devices
Anesthetic Machines	Cell Sorting Instruments - FACS
Inimal Cages	Chemstations - computer controlled
utoclaves	Cryostats Chromatography - Desktop
utosamplers	Cytometry Instruments
lacteria Identification Systems	DNA Sequencers and Analyzers
ameras used in research	DNA Synthesizers and Purifiers
Centrifuges (and rotors)	Electrolyte Analyzers
Chart Recorders	Electron Scanning Microscopes
	Electrophoresis - Gas or Liquid
onductivity Monitors	
iontrol Valves (laboratory scale) Densitometers	Mass Spectrometers -NMR, FTIR, AA, MALDI
Vigital Counters	Molecular Imaging Equipment
vaporator	Particle Counters and Analyzers
ermentors (<100 liters)	Peptide Synthesizers and Sequencers
ume Hoods (portable)	Protein Synthesizers
	Scintillation Counters
ilass Handling Equipment	
lassware Washers	Spectrometers
lucose Analyzers	Spectrophotometers
e Machines	Thermal Analysis Instruments
naging Equipment	Viscometers
icubators	X-Ray Diffratometers
	Other unspecified equipment that is similar in
iquid Samplers	
/icromanipulators	character, scale and technology
ficroscopes	
/icrotomes	
Optical Scanning Detectors	
Organic Synthesizers	
Osmometers	
lvens	
H Analyzers	
ipettes	
umps (laboratory scale)	
adiation Monitors	
leactor Vessels (< 100 liters)	
tefrigerators and Freezers	
iample Handling Equipment	
iamplers	
ihakers	
iterilizers	
tirrers	
JItrasonic Cleaning Systems	
Vaterbaths	
	tement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and possessed, controlled, or managed by the person named as the Assessee in this statement at 12:01 a.m. on January 1,
ignature of assessee or authorized agent	Date 0
lame of Assessee or Authorized Agent	* Title of Assessee or Authorized Agent
lame of Legal Entity	Federal Employer ID Number
ame of Legal Entity	Federal Employer ID Number
	Federal Employer ID Number * Title of Preparers
reparer's Name and Address	
Iame of Legal Entity reparer's Name and Address elephone Number	* Title of Preparers
reparer's Name and Address	* Title of Preparers

Filing Form BOE-571-L Leasing for Leasing Company

If the business property is a *Leasing Company*, the Taxpayer is required to submit *Form BOE-571L + Leasing schedule*. This section details the process of filing *571-L – Leasing Business Personal Property Statement* for Leasing Company on the Community Portal.

 The Taxpayer navigates to the Property (Leasing Company), clicks on *File Online* link within *File Property Statements* tab and then clicks the *Next* button to start the filing process. Clicking *Next* creates the 571-L Leasing statement.

Note: The System shows the option to file using form *Leasing Company (BOE 571-L + Leasing Schedule)*

Record Type Leased Equipment	Type Aci Lessor	count Name	Entity ID Doing Business As	Property ID		1
File Property Statements		Details & Related	Request Property Updates			1
			Welcome to your Prop Based on your records, you are BOE-571-L - I <u>File Online</u>	e expected to file:		
			Request Hardcopy		Previous Next	

- 2. The Taxpayer can refer to Filing Form BOE-571-L and BOE-571-LA for Financial/Insurance Company for completing all sections of the form, with following variations:
 - In *Part I: General Information* section, the Taxpayer chooses *Leasing* as business type. Taxpayer is *not required* to enter *subtype of business*.

	2. Equipment \$0.00	3. Leased Equipment \$0.00	4. Construction in Progress \$0.00	5.Leasehold Improvements \$0.00	Total Reported Cost \$0.00
My Property L	ocation Part I: General	Info Part II: Prope	erty Belonging to You Part II	I: Property Belonging to Others	Submit
Part I: General Info mplete (a) thru (g)	rmation				
a. Select type of busine	255 🛈		* Select subtype of business		
Leasing		Ψ	None		•
b. Enter local telephon	e number		* Email address		
ax Number:					
c. Do you own the land	d at this business location?			recorded as shown on this statement?	
Yes		*	Yes		•
d. When did you start	business at this location?			has changed from last year, enter the form	ner name and/or location
e Enter location of get	neral ledger and all related accounting records	茴			
include zip code):	teraneoger and an related accounting records	Edit			
f. Name of authorized	person to contact at location of accounting records	5	Telephone number of authorize	d person to contact at location of accoun	ting records
	anuary 1, 2020 through December 31, 2020				
. During the period of J	or legal entity (corporation, partnership, limited cquire a "controlling interest" (see instructions for controlling interest" (see instructions for controlling interest)	 (2) If YES, did this business entit instructions for definition) in California 	y also own "real property" (see ornia at the time of the acquisition?		(2), filer must submit form BOE-100-B, d Ownership of Legal Entities, to the
(1) Did any individual		Yes	*	State Board of Equalization. See in:	structions for filing requirements.
(1) Did any individual of ability company, etc.) as	▼				
(1) Did any individual of ability company, etc.) and definition) in this busine					

 The Taxpayer, who is in leasing business/Lessor, can use *Part II: Property Belonging to You* section to provide the details of the assets that have been leased to other businesses. The Property Category is pre-populated to *Leased Equipment* for each asset entered, and cannot be modified. These businesses are required to provide additional documentation, for example the *Leasing Schedule* with details of the leases, type of lease (true or conditional) and lessees. The Taxpayer can click the *Upload Files* button to attach any relevant documentation.

My Property Locati	on	Part I: General Info		Part II: Property	Belonging to You	Part III: Property Belonging to Others		Submit
Part II: Declaration of Prop	erty Belonging to You							
						t not previously reported. Click Save to save change d to recent acquisitions or disposals will be entered		
Compare to Last Year's Assessed Co	sts							
Cancel Save New								
dd attachment Lyload Files Or drop files								
Asset Classification	Acquisition Year		Property Category		Last Year's Assessed Cost	This Year's Reported Cost	Description	n of This Year's Reported Cost
ATMs	2020	/	Leased Equipment				\$123 🖋	/
Furniture and Appliances	2020	/	Leased Equipment				S321 🖋	1
Machinery & Equipment	2020	/	Leased Equipment				S100 🖋 test	1
Cancel Save New								
test								
Please check this box if taxpayer has p	rovided incomplete information							
				Back Next	Print PDF			

Filing Form BOE-571-L Billboard for Billboard Company

If the business property is a *Billboard Company*, the Taxpayer is required to submit *Form BOE-571L + Billboard Schedule*. This section details the process of filing **571-L – Billboard Business Personal Property** *Statement* on the Community Portal.

 The Taxpayer navigates to the Property (Billboard Company), clicks on *File Online* link within *File Property Statements* tab and then clicks the *Next* button to start the filing process. Clicking *Next* button creates a 571-L Billboard statement for the property (if one does not already exist).

Note: The System shows the option to file using form *Billboard Company (BOE 571-L + Billboard Schedule)*

Record Type Business Personal Property	Туре	Account Name	Entity ID	Doing Business As	Property ID	
File Property Statements	File Exemptions	Details & Related	Request Property Up	dates		
			Based on y	e to your Propert	cted to file:	
			File Online	-571-L - Billk	ooard	
			Request Hard	dcopy		
						Previous Next

- 2. The Taxpayer can refer to <u>Filing Form BOE-571-L and BOE-571-LA for Financial/Insurance Company</u> for completing all sections of the form, with following variations:
 - a. In *Part I: General Information* section, the Taxpayer chooses *Entertainment/Media/Communication* as business type and selects the appropriate subtype of their business.

Part I: General Information omplete (a) thru (g)			
Sinplete (a) this (g)			
* a. Select type of business 🕕		* Select subtype of business	
Entertainment/ Media/ Communications	•	Billboard	▼
* b. Enter local telephone number		None	
		Advertising	
Fax Number:		Amusement Park (Not Theme Parks)	
		✓ Billboard	
c. Do you own the land at this business location?		Billiard Rooms	
0		Bash Bladlar	
No	•	Book Binding	
* d. When did you start business at this location?		Bowling Alley	
Oct 30, 2020	苗	Cable	
* e. Enter location of general ledger and all related accounting records			

b. In *Part II: Property Belonging to You* section, the Taxpayer can attach/upload billboard schedule.

My Property Location	>	Part I: General Info	Part II: Propert	y Belonging to You	Part III: Property Belonging to Of	thers	Submit
rt II: Declaration of Pro	perty Belongir	ig to You					
ow for your convenience, please fir	nd a list of assets repor	ted last year. To make a change, pl	ease click on the pencil icc	on beside any asset to edit th	e value or click New to add a new as	set not previously reported	. Click Save to save changes;
cel button will restore the list to w	hen it was last saved.	When finished, click Save and Nex	t in order to move on to th	,	e value or click New to add a new as u need to remove an item, click on t	, , ,	0.1
ted to recent acquisitions or dispo				te next page of the form. If yo	uneed to remove an item, click on a	te penen to change it s cost	to po. Il applicable, detallo
ompare to Last Year's Assessed Co	sets						
sinpare to case real systemet et							
and an Alm							
Cancel Save New							
	ted assets by clicking	the 'Upload Files' button below. N	ote: This is required for lea	asing companies.			
ase attach the details of your repor	ted assets by clicking t	the 'Upload Files' button below. N	ote: This is required for le:	asing companies.			
ase attach the details of your report	ted assets by clicking t	the 'Upload Files' button below. N	ote: This is required for lea	asing companies.			
Save New ase attach the details of your report attachment ① ② ③ ③ ③ ③ ③ ③ ③ ③ ③ ③ ③ ③ ③ ③	ted assets by clicking t	the 'Upload Files' button below. N	ote: This is required for lea	asing companies.			
ase attach the details of your report attachment ① Upload Files Or drop files					1		
ase attach the details of your report attachment ① Upload Files Or drop files are still required to enter individu	al asset line items ever	if you upload a file. Uploading a f			1.		
ase attach the details of your report	al asset line items ever	if you upload a file. Uploading a f			ı		
se attach the details of your report attachment Upload Files Or drop files are still required to enter individu	al asset line items ever	if you upload a file. Uploading a f	le is meant to provide add			Descrip	tion of This Year's Reported

Filing Form BOE-571-L and BOE-571-LA for Financial/Insurance Company

If the property/business is a *Financial Institution or Insurance Company*, Taxpayer is required to submit a *BOE-571-L & BOE-571-LA* Statement. This section details the process of filing your *571-LA Business Personal Property* Statement on the Community Portal.

- The Taxpayer navigates to the Property (Financial Institution or Insurance Company), clicks on *File Property Statements* Tab.
 Note: The System shows the option to file using form *Financial Institution or Insurance Company (BOE 571-L + BOE 571-LA)*
- 2. The Taxpayer clicks *File Online*, then clicks the *Next* button to start filing for the property.

Property						1
Record Type Business Personal Property	Type Apartment Unit	Account Name	Entity ID	Doing Business As	Property ID	
File Property Statements		s & Related Request Pro	perty Updates			
San Francisco Assessor R	ecorder					
		W	elcome to your P	roperty record.		
			Based on your records, you	are expected to file: BOE-571-LA		
		БОГ	2-37 1-L anu	BUE-371-LA		
		File O	nline			
		Reque	st Hardcopy			
						Next

3. The Taxpayer can enter *Mailing Address and Remarks* on the *My Property Location* section. Taxpayer is required to enter the *Mailing address* and can click on *Edit* button to enter/make any changes. The Taxpayer clicks the *Next* button to save and proceed to the next section.

	2. Total Signs Camera TV Equipment etc Cost	3. Total Carpets Drapes Cost	4. Total ATMs Cost	5. Total Vault Door Night Depositories Cost	6. Total Drive-up/Walk- up Window Kiosk Cost	7. Leasehold Improvements Cost	Total Reported Cost \$0
My Property Locati	ion	Part I: General Info	Part II: Propert	y Belonging to You	Part III: Property Belonging to	\$0 Others	Submit
Provide your name and	l mailing address						
Name				Mailing Address 🕚		Edi	t
Business Location							
Property name				Roll Code Secured			•
marks]			
				1			
			Back	Print PDF			

Note: The Taxpayer can click on *Print PDF* button to preview and print the statement.

4. The Taxpayer can update any field in the *Part I: General Info* section. All fields marked with a red asterisk (*) are required to continue to the next section. The Taxpayer enters all the required fields and clicks the *Next* button to save & proceed to the next section.

71-LA: Business Personal Property Statement	
. Total Counterlines 2. Total Signs Camera TV 3. Total Carpets Drapes 4. Total ATMs Cost articlons etc Cost Equipment etc Cost Cost	5. Total Vault Door Night 6. Total Drive-up/Walk- Depositories Cost up Window Klosk Cost Improvements Cost S0
My Property Location Part I: General Info Part II: Prop	erty Belonging to You Part III: Property Belonging to Others Submit
Part I: General Information Complete (a) thru (g)	
* a. Select type of business 🚯	* Select subtype of business
Other Services	Banking/Financial Institution
 b. Enter local telephone number 	* Email address
C. Do you own the land at this business location? Yes d. When did you start business at this location? Nov 1, 2021	If your business name or location has changed from last year, enter the former name and/or location
• e. Enter location of general ledger and all related accounting records (include zip code): Edit T. Name of authorized person to contact at location of accounting records	* Telephone number of authorized person to contact at location of accounting records
g. During the period of January 1, 2020 through December 31, 2020	
Back	ext Print PDF

Note: The Taxpayer must populate *Select type of business* and *Select subtype of business*, with available options as shown in the below table.

Business Type	Business Subtype
	Body Shop/Servicing/Repair
	Car Wash
Automotive	Gas/Service Station
	General
	Sales
	Sand/Dirt/Gravel – Retail/Wholesale Suppliers
	Spray Paint Booths

	Biotech
Biotech	General
	Laboratory
	Car Wash
	Dry Cleaning
Cleaning	General
	Janitorial Service
	Laundry – Commercial/Clothes Cleaning Service
	Laundry – Self Operating/Coin Operated
	Batch Plants (Concrete & Asphalt)
Construction	Demolition Contractor
	General
	Sand/Dirt/Gravel – Retail/Wholesale Suppliers
	Advertising
	Amusement Park (Not Theme Parks)
	Billboard
	Billiard Rooms
	Book Binding
	Bowling Alley
	Cable
	Cell Towers (Including Equip Sheds, Pads, Fences)
	Cell Towers (Tenants' Equipment)
Entertainment/ Media/ Communications	General
	News Publisher
	Offset Lithographic Printing Press
	Photo Labs – Commercial
	Photo Labs – One Hour
	Post-Presses
	Pre-Presses
	Presses
	Radio/TV Broadcasting
	Satelite Dishes (Residential)

	Telephone & Communications
	Theater
	Theme Parks
	Bakery
	Bottling Plants (Other Than Breweries)
	Breweries
	Food Processing
Food Services	General
	Grocery/Supermarket
	Warehousing
	Winery
	Biotech
	Convalescent Care
	Dental Lab
	Drug/Pharmaceutical Mfg
	General
Health	Health Clubs/Gyms
	Laboratory
	Medical/Dental
	Pharmacy And Drug Store
	Veterinary Hospital
Leasing	-None-
	Apartment
Lodging	General
	Hotel
	Short Term Rental
	Batch Plants (Concrete & Asphalt)
	Brick, Sewer Pipe, Terra Cotta or Tile Manufacturing
	Canneries
	Cement Manufacturing
	Chemicals and Allied Product Mfg

	Circuit Board Mfg
	Cogeneration (Power Plants)
	Dental Lab
Manufacturing	Drug/Pharmaceutical Mfg
	Electronic Equipment Manufacturing
	Food Processing
	General
	Ice Plant
	Laboratory
	Semiconductor
	Sugar & Sugar Product Manufacturing
Non-Profit	-None-
Organizations	General
Organizations	School or Instructional Institution
	Banking/Financial Institution
	Cable
	Dry Cleaning
	Financial Services
	Floor Covering and Installation Services
	Gas/Service Station
Other Services	General
	Insurance Services
	Janitorial Services
	Laboratory
	Mortuaries
	Recyclers
	Telephone & Communication
	Book Binding
	General
	Offset Lithographic Printing Press
	Photo Labs – Commercial
Printing	Photo Labs – One Hour

	Post-Presses
	Pre-Presses
	Presses
	Building/Parking Management
Property Management	General
	Janitorial Service
	General
Retail/Wholesale	Pharmacy and Drug Store
	Sand/Dirt/Gravel Supplier
	Warehousing

5. The Taxpayer completes *Part II: Property Belonging to You* section. The Taxpayer can click the *Upload Files* button to attach any relevant documentation to this filing. The Taxpayer can also provide the details of the assets owned by them and any improvements they might have done to the property by clicking on the *New* button.

	quipment etc Cost Co	. Total Carpets D ost	4. Total ATMs Cost \$134	5. Total Vault Door Night Depositories Cost \$0		Drive-up/Walk- dow Kiosk Cost Improvement \$11.895	ts Cost \$53,590
My Property Location	Part I: Gener		Part II: Property Belonging to Yo	_		Part III: Property Belonging to Ot.	Submit
art II: Declaration of	Property Belonging	to You		_/			
	isposals will be entered in the S		Save and Next in order to move on to	the next page of the form. If you n	eed to ren	ove an item, click on the pencil to ch	hange it's cost to \$0. If applicable, detail
u are still required to enter indiv	vidual asset line items even if y	ou upload a file. I	Uploading a file is meant to provide a			This Yast's Banortad Cost	Description of This Year's Repor
u are still required to enter indiv sset Classification		ou upload a file.	Uploading a file is meant to provide a Property Category Alternate Schedule A	additional information if needed.		This Year's Reported Cost	Cost
, are still required to enter indiv sect Classification TMs pounterlines, Partitions, Cafeter	vidual asset line items even if y		Property Category				Cost
u are still required to enter indiv sset Classification TMs ounterlines, Partitions, Cafeter quipment, etc.	vidual asset line items even if y Acquisition Year 2020 ia 2020	-	Property Category Alternate Schedule A			\$134 ,	Cost
	vidual asset line items even if y Acquisition Year 2020 a 2020 b	1	Property Category Alternate Schedule A Alternate Schedule A Bidg/Bidg Impr/Leasehold			\$134 , \$41,561 ,	Cost

	Upload Files	
LA Form.xlsx xLS 33 KB		•
1 of 1 file uploaded		Done

6. If the Taxpayer reported assets in previous assessment years, then all previously assessed assets are displayed by default. The Taxpayer can make necessary changes and click *Save* to save them. The Taxpayer can change *This Year's Reported Cost* to zero, if the asset no longer applies.

Cancel button will restore the list to wh	l a list of assets reported last year. To en it was last saved. When finished, o	make a change, please click on the pencil ico click Save and Next in order to move on to th in Part II, before you proceed to Part III.			
Compare to Last Year's Assessed Cos	ts				
Cancel Save New Add attachment	i asset line items even if you upload a	i file. Uploading a file is meant to provide add	itional information if needed.		
Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
		Property Category Construction in Progress	Last Year's Assessed Cost	This Year's Reported Cost \$30,000.00 🖋	
Asset Classification Construction in Progress ATMs	2020		Last Year's Assessed Cost \$2,000.00		Cost
Construction in Progress	2020	Construction in Progress		\$30,000.00 💉	Cost
Construction in Progress ATMs	2020	Construction in Progress Alternate Schedule A	\$2,000.00	\$30,000.00 x \$2,000.00 x	Cost

7. To add a new asset(s) to the filing, the Taxpayer can click the *New* button under *Asset Classifications*. This displays a popup to enter *Asset Classification*, *Acquisition Year* and the *Cost* of the new asset. The Taxpayer enters all fields marked with a red asterisk (*) and clicks the *Save* button.

Create Statement Reported Asset					
Form	BOE-571-L& BOE-571-LA - Financial Institution or Insurance Company				
*Asset Classification	Counterlines, Partitions, Cafeteria Equipment, etc.				
Asset Type	None				
* Acquisition Year	2020				
*Cost	\$5,000.00				
Description	Large animal bath tub				
Cancel Save					

8. The Taxpayer can click on the pencil icon to make any changes to assets and click the *Save* button. The Taxpayer can click *Cancel* to revert the changes.

Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
easehold Improvements - Fixtures	2020	Bidg/Bidg Impr/Leasehold Impr/Land/Land Impr		50000	
easehold Improvements - Structure	2020	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr		\$10,000.00 💉	1
Cancel Save New					

9. If there are no assets to declare, the Taxpayer clicks the certification check box before clicking the *Next* button to proceed.

571-LA: Busin	ess Personal F	Property State	ment				
Property:							
1. Total Counterlines Partitions etc Cost \$0	2. Total Signs Camera TV Equipment etc Cost \$0	3. Total Carpets Drapes Cost \$0	4. Total ATMs Cost \$134	5. Total Vault Door Night Depositories Cost \$0	6. Total Drive-up/Walk- up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	Total Reported Cost \$53,590
My Property Location	on 💙 Part I: G	eneral Info Part I	I: Property Belonging to You	Part II - Schedule D	Part III: Property	/ Belonging to Ot	Submit
Part II: Declaration	of Property Belon	ging to You					
reported. Click Save to save	changes; Cancel button will	restore the list to when it wa	as last saved. When finished,	ncil icon beside any asset to a click Save and Next in order t ill be entered in the Schedule	o move on to the next page	of the form. If you need to r	· · · · · · · · · · · · · · · · · · ·
Compare to Last Year's As	sessed Costs						
Cancel Save N	lew						
Add attachment ① ① Or of	drop files						
You are still required to ente	er individual asset line items	even if you upload a file. Uplo	oading a file is meant to prov	ide additional information if r	needed.		
* I certify that I have no	individual Asset Classificati	on Line Items' by default					
Asset Classification	Acquisition Year	Property Cat	tegory Last	-+Cost	This Year's Reported Cost	Description of This Reported Cost	Year's
Cancel Save N	ew			The Taxpayer mu an Asset or click t button that there a decla	he certification re no assets to		
			Back Next Pr	int PDF			_

10. The Taxpayer is required to complete *Schedule D*, if Leasehold Improvements assets (Fixtures or Structures) are entered in *Part II: Property Belonging to You* section.

al Counterlines 2. To	otal Signs Camera TV 3. Total	Carpets Drapes 4. Total ATMs Cost	5. Total Vault Door Night d	ó. Total Drive-up/Walk- 7. Leasehold	Total Reported Cost
ions etc Cost Equ 61 \$0	ipment etc Cost Cost \$0	\$134		up Window Kiosk Cost Improvements Co \$0 \$11,895	st \$53,590
My Property Location	Part I: General Info	Part II: Property Belonging to You	Part II - Schedule D	Part III: Property Belonging to Ot	Submit
I - Schedule D					
You have reported a	cost of \$9,763.00 in Leasehold I	mprovements - Structure with acquisition yea	r 2020 for a Net change of \$9,763.	00.	
Please click here to provide n	nore information of the Acquisitio	ns or Disposals that caused this change.			
New					
Туре	Month of Addition/D	isposal Year of Addition/Disposal	Cost	Description	
Туре	Month of Addition/D	isposal Year of Addition/Disposal	Cost	Description	
		isposal Year of Addition/Disposal mprovements - Fixtures with acquisition year			
✓ You have reported a	cost of \$2,132.00 in Leasehold I	mprovements - Fixtures with acquisition year			
✓ You have reported a	cost of \$2,132.00 in Leasehold I				
✓ You have reported a	cost of \$2,132.00 in Leasehold I	mprovements - Fixtures with acquisition year			
You have reported a	cost of \$2,132.00 in Leasehold I	mprovements - Fixtures with acquisition year ns or Disposals that caused this change.			
You have reported a Please click here to provide n New	r cost of \$2,132.00 in Leasehold I nore information of the Acquisitio	mprovements - Fixtures with acquisition year ns or Disposals that caused this change.	2020 for a Net change of \$2,132.0	0.	
Vou have reported a Rease click here to provide n New	r cost of \$2,132.00 in Leasehold I nore information of the Acquisitio	mprovements - Fixtures with acquisition year ns or Disposals that caused this change.	2020 for a Net change of \$2,132.0	0.	
You have reported a Please click here to provide n New	r cost of \$2,132.00 in Leasehold I nore information of the Acquisitio	mprovements - Fixtures with acquisition year ns or Disposals that caused this change.	2020 for a Net change of \$2,132.0	0.	
Vou have reported a lease click here to provide n New	r cost of \$2,132.00 in Leasehold I nore information of the Acquisitio	mprovements - Fixtures with acquisition year ns or Disposals that caused this change.	2020 for a Net change of \$2,132.0	0.	

11. The Taxpayer can click the **New** button and enter each of their acquisitions and disposals related to the **Leasehold Improvements** entered in Part II. The Taxpayer enters all fields marked with a red asterisk (*) in the popup window and clicks the **Save** button.

	Edit Reported Asset Schedule	
ÿpe	Addition	•
Addition/Disposal Month	January	•
dition/Disposal Year	2020	
Cost	\$10,000.00	
Description	Leasehold Improvements done	
Cancel Save		

12. The Taxpayer can update the Schedule line items by clicking on the pencil icon. The Taxpayer completes Schedule D and clicks *Next* button to continue with the filing.

Note:

- The *Next* button is enabled only if the net change reported for each asset is equal to the total cost of *Additions and Disposals* for that asset.
- The Taxpayer cannot delete an *Addition/Disposal* line item. The Taxpayer can change the *Cost* to zero, if added by mistake.
- The net total of *Addition/Disposal* should be equal to the *Cost* entered for the Leasehold Improvement entered in *Part II: Property Belongings to You* section.

ons etc Cost Equ 51 \$0	otal Signs Camera TV 3. Total Carpets Di ipment etc Cost Cost \$0	4. Total ATMs Cost \$134	Depositories Cost	6. Total Drive-up/Walk- Jp Window Kiosk Cost Improvements Cost S0 \$11,895	Total Reported Cost \$53,590
My Property Location	Part I: General Info	Part II: Property Belonging to You	Part II - Schedule D	Part III: Property Belonging to Ot	Submit
I - Schedule D					
 You have reported a 	cost of \$9,763.00 in Leasehold Improveme	nts - Structure with acquisition year 2	2020 for a Net change of \$9,763.	00.	
New					
Туре	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
Addition	January	2020	\$9,763	Leasehold Improvements Done	
 You have reported a 	cost of \$2,132.00 in Leasehold Improveme	nts - Fixtures with acquisition year 20)20 for a Net change of \$2,132.0	0.	
New					
Туре	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
Addition	March	2020	\$2,132	more additions	

13. All businesses that are leasing assets from other leasing companies can report the leased assets under *Part III: Property Belonging to Others section*. The Taxpayer can click the *Upload Files* button to attach any relevant documentation to this filing and click *New* button to report the assets leased. If there are no leased assets leased from Lessors to declare, the Taxpayer must click the certification check box and click *Next* to proceed to the next step.

571-LA: Busi Property:	ness Personal	Property Sta	tement				
1. Total Counterlines Partitions etc Cost \$41,561	2. Total Signs Camera TV Equipment etc Cost \$0	3. Total Carpets Drapes Cost \$0	4. Total ATMs Cost \$134	5. Total Vault Door Night Depositories Cost \$0	ó. Total Drive-up/Walk- up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	Total Reported Cost \$53,590
My Property Locat	tion > Part I: G	General Info 🛛 🔪 Pa	art II: Property Belonging to You	Part II - Schedule D	Part III: Property	Belonging to Ot	Submit
	r or lessee has the tax obligatio		report the owner's name and mail , the Assessor will consider, but is	-			or B
Add attachment	lew drop files						
Lessor's Name	Tax Obligation	Leased Equipment Typ	e Year of Acq.	Cost to Purchase	Annual Rent	Description	
	lew	to others	Lessor's Nar certification b	er must add a ne or click the utton that there or to declare.			
_			Back Next Print P	DF			

14. Upon clicking *New* button, Taxpayer enters all fields in the *Create Statement Reported Assets* popup window and clicks *Save*. All fields marked with a red asterisk (*) are required.

Create Statement Reported Asset						
Form	BOE-571-L& BOE-571-LA - Financial Institution or Insurance Company 💌					
Property Category	Leased Equipment					
Leased Equipment Type	Government-Owned Property					
*Asset Classification	ATMs 👻					
Lessor's Name						
Lessor's Mailing address						
Tax Obligation	Lessor v					
*Acquisition Year	2020					
Manufacture Year	2019					
Description						
Leased Number						
*Cost	\$10,000,00					
Annual Rent	\$500.00					
Cancel Save	astronov					

15. The Taxpayer enters all assets belonging to others and clicks *Next* button to proceed to the next section.

roperty:		Property Statemen							
1. Total Counterlines Partitions etc Cost \$41,561	2. Total Signs Camera TV Equipment etc Cost \$0	3. Total Carpets Drapes 4. Total Cost \$134	I ATMs Cost 5. Total Vault Depositories \$0			Total Reported Cost \$63,590			
My Property Location	n 👌 Part I: Ge	eneral Info Part II: Property	y Belonging to You 👌 🦳 Part	II - Schedule D Part III:	Property Belonging to Ot >	Submit			
Part III: Declaration of Property Belonging to Others property belonging to others, or their business entities, is located on your premises, report the owner's name and mailing address. If it is leased equipment, read your agreement carefully and enter A (Lessor) or B (Lessee), and whether lessor r lessee has the tax obligation. For assessment purposes, the Assessor will consider, but is not bound to, the contractual agreement. You may either upload a file or enter the items individually by clicking 'New'. Cancel Save New dd attachment Upload Files Or drop files									
.essor's Name	Tax Obligation	Leased Equipment Type	Year of Acq.	Cost to Purchase	Annual Rent	Description			
.essor's Name	Tax Obligation	Leased Equipment Type Government-owned property		Cost to Purchase	Annual Rent \$500 🖌	Description			

16. The Taxpayer provides signature information (fields marked with a red asterisk (*) are required) and clicks the *Submit* button.

operty:							
1. Total Counterlines Partitions etc Cost 841,561	2. Total Signs Camera TV Equipment etc Cost \$0	3. Total Carpets Drapes Cost \$0	4. Total ATMs Cost \$10,134	5. Total Vault Door Night Depositories Cost \$0	ó. Total Drive-up/Walk- up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	Total Reported Cost \$63,590
My Property Loca	tion Part I: C	Seneral Info 🛛 👌 Pai	rt II: Property Belonging to You	Part II - Schedule D	Part III: Property	Belonging to Ot	Submit
ign & Submit							
			examined this property stateme owned, claimed, possessed, cont				
 Signature of assessee or 		area to be reported which is	owned, claimed, possessed, com		n named as the Assessee in th	ns statement at 12.01 a.m. c	n January 1, 2021.
0	5			- Date 🚯			
* Name of Assessee or Au	thorized Agent			Title of Assessee or Author	rized Agent		
				Owner			
* Name of Legal Entity				Federal Employer ID Numbe	r		
* Preparer's Name and Ad	ddress			* Title of Preparer			
				Owner			
 Telephone Number 				Business Description			
				None			•
Ownership Type							
Proprietorship			•				
Remarks							

17. The Community Portal displays the completed certification. The Taxpayer can click *View Statement* link to view the detailed statement. The Taxpayer can click *Print* link to print the certificate (or) to save a copy for later reference.

		Certification Compl	ete	
Tha	nk you for electronica	lly filing. Listed below	is your confirmation number.	
Statement Prope Confirmation Nu Date of Submi	rty Id:		ncial Institution or Insurance Company	
You n	nay view your e-File	d statement by click	ing "View Statement" below.	
	Home	Print	View Statement	

18. The Taxpayer receives an email informing them of their filing along with details related to the statement.

Thu 11/5/2020 10:49 PM noreply@salesforce.com on behalf of NoReply.Assessor-Recorder@sfgov.org Sandbox: The San Francisco Assessor-Recorder Office Has Received Your Filed Statement						
		THE REPORT OF TH	l			
_		Statement Type: BOE-571-L & BOE-571-LA - Financial Institution or Insurance Company Property Id: Confirmation Number: Date of Submission: 11/6/2020 6:49 AM				

Filing a Vessel Property Statement (Includes 50 Ton Vessel Exemption)

This section details the process to file a 50 ton vessel exemption on the Community Portal.

1. On the Community Portal Home page, the Taxpayer clicks the vessel *Property Name* for which an exemption needs to be filed.

lome	My Details 🗸	Additional Resources 🗸	
		e City and County of San Francisco Assess new web portal, you can electronically file your Statements and Exem your Business Accounts and Property Locations, as well as create of	nptions Forms, review and manage
To get sta this year.		ty ink your Business Accounts and Properties. You will be asked to input an Entity ID an ed, you will be able to see all the associated Properties below. You may also link multi	
		Access PIN to view information online, please request a replacement notice. You may it to a customer service case with our office.	request this by navigating to the Additional Resources tab above and
		ation out your Accounts and Properties by clicking on the My Details tab above. There you	can also view your past filings, assessment history, and any customer
		Add Account/Property	
To file BP		ng Property Details s forms, select the appropriate Property listed below and choose the File Property St Accounts linked to view information and request updates.	atements or File Exemptions tab to access our online filing system. You
roperties	Accounts/Businesses		
M B	operties y Properties orted by Property Name • Filtere	by All properties - Type, Record Type • Updated a few seconds ago	C
P	roperty Name 🕇	✓ Status	✓ Account Name ✓
1		Active	
2		Active	
3		Active	

2. The *File Property Statement* tab opens by default and the Taxpayer clicks the *File Online* link and clicks the *Next* button.

		Θ		
Home My Details 🗸 🥖	dditional Resources 🗸			
Property				
Record Type Account Name Vessel	Entity ID Vessel Name Property ID Habitual Location of Vessel SF Yacht Harbor			
ile Property Statements File Exemp	ions Details & Related Request Vessel Updates			
San Francisco Assessor's Office				
	Welcome to your Property record.			
Based on your records, you are expected to file:				
	<u>File Online</u>			
	Request Hardcopy			
		Next		

3. The Taxpayer reads the official statement and instructions and clicks the *Next* button.

INSTRUCTIONS GENERAL INFO

SECTION II SECTION III

I III DECLARATION

Official Statement

BOE-576-D: VESSEL PROPERTY STATEMENT

A report on BOE-576-D is required of you by section 441(a) of the Revenue and Taxation Code (Code). The statement must be completed according to the instructions and field with the Assessor on or before April 1. Failure to file it on time will compel the Assessor to estimate the value of your property from other information in the assessor's possession and add a penalty of 10 percent as required by Code section 463.

This statement is not a public document. The information contained herein will be held secret by the Assessor (Code section 451), it can be disclosed only to the district attorney, grand jury, and other agencies specified in Code section 408. Attached schedules are considered to be part of the statement. In all instances, you must return the original BOE-576-D.

General Instructions

ADDRESS BLOCK: Make necessary changes to assessee, mailing address, and enter all information that is applicable to your particular vessel.

1. PURCHASE INFORMATION: Enter the total original cost of the vessel as purchased. Include sales tax and all other relevant costs. If the vessel exceeds 27 feet in length a copy of your purchase agreement or invoice is required to be submitted with this statement.

9. CURRENT VESSEL CONDITION: Using the information below, check the line that reflects the condition of your vessel:

SECTION I

NEW/BRISTOL: is a vessel that is new or is maintained in mint or a fashion usually better than factory new — loaded with extras. Turnkey, no commissioning necessary.

ABOVE AVERAGE: Has had above average care and is equipped with extra electrical and electronic gear. A well-found vessel ready to go.

AVERAGE: Clean, ready for sale. Attractive inside and out, normally equipped. Mechanically sound, mid-time on mechanicals, and little or no additional work.

· GOOD: Mechanically sound, requiring some interior and exterior cosmetic work. Some mechanicals on the down side of life expectancy,

· FAIR: Cosmetics still show noticeable areas of wear and fading after cleanup. Mechanically sound but definitely on the down side of life. May require substantial yard work

POOR: Vessel needs significant amount of structural yard repair. Most mechanicals, electronics, need overhaul or replacement. Cosmetics almost not restorable. Cost of repairs and restoration may exceed market value of the vessel.

10. INTENDED USE - COMMERCIAL FISHING, OCEANOGRAPHIC RESEARCH OR COMMERCIAL PASSENGER FISHING: A Vessel may be eligible for a special 4 percent assessment under the provisions of Code section 227 if the boat is engaged exclusively:

· In the taking and possession of fish or other living resource of the sea for commercial purposes.

In instruction or research studies as an oceanographic research vessel.

· In carrying or transporting seven (7) or more people for commercial passenger fishing purposes and holds a current certificate of inspection issued by the United States Coast Guard.

If, in your opinion, the vessel meets the above criteria, obtain the BOE-576-E, Affidavit for 4 Percent Assessment of Certain Vessels, from the Assessor and file on or before February 15.

10. INTENDED USE - OTHER: If you file a Business Property Statement, or if this vessel is used in connection with any business, trade, or profession located within this County, enter the name and address of the business.

VESSEL EQUIPMENT LEASED, ADDED or RETIRED: If you lease equipment in connection with this vessels operation, attach a schedule listing the name and address of the owner and description of the leased property cost if purchased, and annual rent. If you have added or retired equipment from date of acquisition of vessel to last day in December, last year, attach a schedule listing the description of equipment. The date added or retired, and the added or retired equipment's cost. Explain any major overhaul of the vessel, its engine.

DECLARATION BY ASSESSEE: The law requires that this property statement, regardless of where it is executed, shall be declared to be true under penalty of perjury under the laws of the State of California. The declaration must be signed by the assessee, a duly appointed fiduciary, or a person authorized to sign on behalf of the assessee. In the case of a corporation, the declaration must be signed by an officer or by an employee or agent who has been designated in writing by the board of directors, by name or by title, to sign the declaration on behalf of the corporation. In the case of a partnership, the declaration must be signed by a partner or an authorized employee or agent. In the case of a Limited Liability Company (LLC), the declaration must be signed by an LLC manager, or by a member where there is no manager, or by an employee or agent designated by the LLC manager or by the members to sign on behalf of the LLC.

When signed by an employee or agent, other than a member of the bar, a certified public accountant, a public accountant, an enrolled agent or a duly appointed fiduciary, the assesses's written authorization of the employee or agent to sign the declaration on behalf of the assessee must be filed with the Assessor. The Assessor may at any time require a person who signs a property statement and who is required to have written authorization to provide proof dathorization.

A property statement that is not signed and executed in accordance with the foregoing instructions is not validly filed. The penalty imposed by Code section 463 for failure to file is applicable to unsigned property statements

VETERANS EXEMPTION: To file a Claim for Veterans' Exemption on the declared vessel, obtain BOE-261 from the Assessor. The exemption claim must be filed on or before February 15. No such exemption shall apply if (a) the unmarried veteran or unmarried pensioned parent owns property valued at \$5,000 or more, (b) a married veteran or married pensioned parent who, together with the spouse, owns property valued at \$10,000 or more, or (c) the unmarried widow or widower of a deceased veteran owns property in excess of \$10,000.

HOMEOWNERS EXEMPTION: If the declared vessel is your principal place of residence, and you have not previously filed a Claim for Homeowners' Property Tax Exemption stating this fact, obtain BOE-266 from the Assessor. The exemption claim must be filed on or before February 15.

ARMED FORCES MEMBERS EXEMPTION: If you are not a resident of the State of California, but are in this state solely by the reason of compliance with military orders, you may declare tax situs elsewhere by filing BOE-261-D, Service members Civil Relief Act Declaration. Obtain the declaration form from the Assessor or from your unit Legal Officer.

OVER 50 NET TONS EXEMPTION: If your vessel is over 50 net tons burden, certified and engaged in the transportation of freight or passengers, complete the form and send with a copy of the vessel document and the U.S. Coast Guard or SOLAS certificate.



4. The Taxpayer enters required information marked with a red asterisk (*), enters other general information about their vessel. Many fields will be pre-populated with existing data in the

SMART System, but the taxpayer should confirm the values are correct. Taxpayer clicks the **Next** button.

	BOE-576-D: VESSEL PROPERTY STATEMENT	
For Assessor's Use Only		
Vessel Id		
/essel Name		
Vessel Property		
Name and Mailing Address		
* Account Name	* Contact Name	This is where your correspondences will be mailed to
Test Account	Vessel Property	
Mailing Care Of	* Mailing Street Number	
None Y	Mailing Street Pre-Direction	
* Mailing Street Name	* Mailing Street Type Street	
Mailing Unit Type	Mailing Unit Number	
None v	Maning One Number	
* Mailing City	* Mailing State	
San Francisco	California	
* Mailing Postal Code	Mailing Postal Code Extension	
Mailing Country		
United States of America		

5. The Taxpayer completes *Section I* of the form by entering the required information marked with a red asterisk (*) on vessel and registration. Many fields will be pre-populated with existing data in the SMART System, but the taxpayer should confirm the values are correct. The taxpayer clicks the *Next* button.

TRUCTIONS	GENERAL INFO	SECTION I	SECTION II	SECTION III	DECLARATION	
ection I: Mu	ust be completed	Annually				
/essel Name					CF Number/Vessel Registration Number	
/essel2					The vessel ID issued by either DMV or US Coast Guard	
ssel ID Type					* Habitual Location of Vessel	
US Coast Gua	rd			~	South Beach Harbor	~
elect whether the MV or US Coast	e CF Number/Vessel R t Guard	egistration Number e	entered previously was	provided by the		
lip Number					* Telephone Number	
🗹 Save 🛛 💆	Print PDF				✓ Previous	Next 🕨

6. The Taxpayer filing for the first time or making changes within the last calendar year must fill *Section II* of the form. The Taxpayer completes this by providing purchase information and vessel classifications. In order to qualify for a 50-ton vessel exemption, a Taxpayer must enter *Net Tons* as *50 or greater*. The Taxpayer must enter required information marked with a red asterisk (*) before proceeding to the next step. Many fields will be pre-populated with existing data in the SMART System, but the taxpayer should confirm the values are correct. The taxpayer clicks the *Next* button.

	BOE-576-D: VESSEL P	ROPERTY STATEMENT		
Section II: Complete if First Time Filing or if	any Change Within the Las	t Calendar Year		
* Vessel Manufacturer		Vessel Model		
Boeing		CAT-1969		
* Vessel Year		HIN		
2015 Vessel Manufacture Year		Multi Manatificanti an Atumban		
• Length		Hull Identification Number		
42.00		beam		
Measured in feet		Measured in feet		
Draft		Vessel Displacement		
Measured in feet				
	Net Tons is >50, a sel exemption will be	Net Tons		
	generated.	60.00		
		Coast Guard Documented		
Engine Manufacturer		Engine Model		
Number of Engines		Engine HP Each		
1		39.00 Vessel Engine horsepower, :	for each individual engine if there are more than o	one.
Engine Year		Last County Assessed		
2006				
Taxes Paid		Date Vessel First Moved	to County	
\$		😁 mm/dd/yyyy		
Taxes Paid in the the previous year				
1. Purchase Information				
Purchase From	Purchase Price			
	\$		() when you purchased the vessel	
Purchased with Engine?	Purchased with Trailer?			
Address (city, county, state, zip code)	Purchase Date			
	h	610		
Sale Information				
Sold To	Sale Price		f you sold the vessel	
	\$			
Sold with Engine?	□ Sold with Trailer?			
Address (city, county, state, zip code)	Sale Date			
	🛱 mm/dd/yyyy	Ē		
	h.			
Removal Information				
	Address moved To (city, co	unty state tin code)		
Vessel Permanently Removed from County	Hadress moved to (eng, es	ancy, state, up code,	if the vessel left San Francisco	
		ĥ		
Removal Date				
🗂 mm/dd/yyyy				
Vessel Classifications				
• Boat Type				
Power Boat	~			
Vessel Classifications				
* Power Boat Type Motor Yacht	~	Power Boat Type – Other		
model facilit	v	This is required to fill out if you se	elect Other as the Power Boat Type.	
Hull Type				
None	~			
Hull Material				
None	~			
Condition When Purchased				
Average	~			
Current Vessel Condition				
Average	~			
Intended Use				
Other	~			
Intended Use - Other				
Service business				
Propulsion				
None	~			
Engine Fuel Type				
None	~			

7. The Taxpayer completes *Section III* of the form by providing loss information. The Taxpayer can attach additional documentation, if needed, to support the statement, then click the *Next* button.

			BOE-57	6-D: VE\$\$EL PR	OPERTY STATEMENT
Section III: L	_OSS				
ADDITION S/MC	eport, Coast Guard re of the original repos DDIFICATIONS - Expla extension, railing, up	session notificatio	n from the lending i modifications to the	vessel since	

Choose F	ile No file chosen		
Upload docur			
ction	Document Name	Update Date/Time	

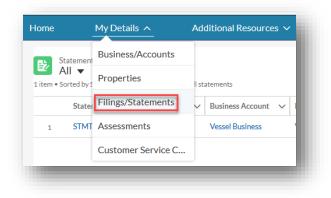
8. The Taxpayer must enter required information marked with a red asterisk (*), then signs the declaration and clicks the *Submit* button.

eclaration by Assessee	
	: VESSEL PROPERTY STATEMENT completed and signed. If you do not do so, it may result in penalties.
-	
I certify (or declare) under penalty of perjury under	r the laws of the State of California that I have examined this property statement,
including accompanying schedules, statements or	r other attachments, and to the best of my knowledge and belief it is true, correct,
and complete and includes all property required	to be reported which is owned, claimed, possessed, controlled, or managed by
	sessee in this statement at 12:01 a.m. on January 1, 2021.
vnership Type	
Proprietorship	v
ignature of Assessee or Authorized Agent	Date
	The Signature Date will be populated upon submission.
ītle	* Name of Assessee or Authorized Agent
Лr.	
lame of Legal Entity (other than DBA)	Federal Employer ID Number
/essel Property	Enter FEIN (also known as Tax ID). Please do not enter SSN.
Preparer's Title	* Preparer's Name
Ar.	
Preparer's Address	* Preparer's Telephone
Preparer's Email Address	
2	
IS STATEMENT IS SUBJECT TO AUDIT	

9. The Taxpayer receives an email informing them of their filing along with details related to the statement.



- 10. The Taxpayer receives automated exemption approval or denial notice via email.
- 11. The Taxpayer can view the submitted statement by navigating to the *My Details* menu and clicking the *Filings/Statements* menu item. The Taxpayer clicks the *Statement Number* to view its details.



		it Number • Filter							
	State 🕇 🗸	Amend 🗸	Busines 🗸	Property V	Form V	Status 🗸	File Date 🗸	As ∨	Fil 🗸
	STMT-00000		Test Account	Test BPP 1 @	BOE-571-STR - Short-Term Rental Property Statement	Received	10/30/2020	2021	eFile
	STMT-00001	STMT-00000	Test Account	Test BPP 1 @	BOE-571-STR - Short-Term Rental Property Statement	Received	10/30/2020	2021	eFile
;	STMT-00002		Test Account	Test BPP 2 @	BOE-571-STR - Short-Term Rental Property Statement	Received	10/30/2020	2021	eFile
ŀ	STMT-00006		Test Account	Rental Property @	BOE-571-R - Business Apartment Statement	Received	11/6/2020	2021	eFile
	STMT-00007	STMT-00002	Test Account	Test BPP 2 @	BOE-571-STR - Short-Term Rental Property Statement	Received	11/6/2020	2021	eFile
,	STMT-00008		Test Account	L Form Property @	BOE-571-L & BOE-571-LA - Financial Institution or Insurance Co	Received	11/6/2020	2021	eFile
,	STMT-00009	STMT-00000	Test Account	Test BPP 1 @	BOE-571-STR - Short-Term Rental Property Statement	Received	11/6/2020	2021	eFile
	STMT-00010		Test Account	Rental Property 2 @	BOE-571-R - Business Apartment Statement	Received	11/6/2020	2021	eFile
,	STMT-00011		Test Account	Vessel Property @ Fisherman's Wharf	BOE-576-D - Vessel Property Statement	Received	11/6/2020	2021	eFile

Filing a Vessel Exemption (4% affidavit)

This section details the process to file an online vessel exemption for 4% affidavit.

1. On the Community Portal Home page, the Taxpayer selects the vessel Property for which an exemption needs to be filed and clicks the *File Exemptions* tab.

ome M	1y Details 🗸	Additional Resources 🗸		
Property				
Vessel Name	Property ID	Habitual Location of Vessel	Status	
		Fisherman's Wharf	Active	
ile Property Sta	atements File Exem	ptions Details & Related	Request Vessel Updates	
San Francisco	Assessor's Office			
			Welcome to your Property record.	
			Welcome to your Property record. Based on your records, you are expected to file: 576-D	

2. The form BOE-576-E Vessel Exemption is already selected, and the Taxpayer clicks the *Next* button.

ne M	ly Details ∨	Additional Resources 🗸			
Property					
Vessel Name	Property ID	Habitual Location of Vessel Fisherman's Wharf	Status Active		
e Property Sta	tements File Exer	nptions Details & Related	Request Vessel Updates		

3. The General Information pages displays with instructions for completing the form. The Taxpayer reads this section. On any of the pages, the Taxpayer can click the Print PDF button to print the form in PDF format and can click the Save button to save the information filled out in the form and resume form completion at a later time. The Taxpayer clicks the Next button to proceed to the next page.

eneral Informati	1
	BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS
evenue and Taxation C nployed exclusively in	le section 227 states: "A documented vessel, as defined in Section 130, shall be assessed at 4 percent of its full cash value only if the vessel is engaged or iy of the following:
) In the taking and pos	ssion of fish or other living resource of the sea for commercial purposes.
) In instruction or rese	ch studies as an oceanographic research vessel.
) In carrying or transpo uard.	ing seven or more people for hire for commercial passenger fishing purposes and holds a current certificate of inspection issued by the United States Coast
reason of that vessel	ed to be engaged or employed in activities other than the carrying or transporting of seven or more persons for hire for commercial passenger fishing purposes sing used occasionally for dive, tour, or whale watching purposes. For purposes of this subdivision, 'occasionally' means 15 percent or less of the total operating liately preceding assessment year."
quired by Section 254	le section 275.5 states: "If a person claiming classification of a vessel as a documented vessel eligible for assessment under Section 227 fails to file the affidavit / 5 p.m. on February 15 of the calendar year in which the fiscal year begins, but files that affidavit on or before the following August 1, the assessment shall be 80 percent of the reduction that would have been allowed had the affidavit been timely filed."

4. On the Filing Year page, the *Claim Fiscal Year* is pre-filled. The Taxpayer clicks the *Next* button to proceed to the next page.

RALINFORMATION FILING YEAR APPLICANT INFORMATION VESSEL INFORMATION CI	
BOE-576-E: AFFIDAVIT FOR 4 PERCENT A	ASSESSMENT OF CERTAIN VESSELS
0 Affidavit for 4 Percent Assessment of Certain Vessels	
aim Fiscal Year 2020 2020 Year is pre-filled	To receive the full benefit of the reduced assessment, file this affidavit with the Assessor by February 15. If the affidavit is filed between February 16 and August 1, 80% of the reduced assessment is available.
Save 良 Print PDF	Previous Next

5. The Taxpayer completes the *Applicant Information* section of the form. The Taxpayer enters the required information marked with a red asterisk (*) before proceeding to the next step, then clicks the *Next* button.

* Mailing Street Name * Mailing Street Type Mailing Unit Type Street -None * * Mailing City * Mailing State		
* Applicant Last Name * Applicant Last Name Corporation, Partnership, DBA Corporation, Partnership, DBA Mailing Care Of * Mailing Street Number Image: Street Fraction Mailing Street Fraction Mailing Street Fraction Mailing Street Fraction Mailing Street Name • None- • Mailing Street Name • Mailing Unit Type • Mailing City • Mailing Postal Code • Mailing Postal Code Extension • Mailing Country	BOE-576-E: A	FIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS
Corporation, Partnership, DBA Mailing Care Of • Mailing Street Number Mailing Street Fraction Mailing Street Pre-Direction Mailing Street Fraction • Mailing Street Type • Mailing Street Name • Mailing Street Type • Mailing Unit Type Mailing Unit Number • None ✓ • Mailing City • Mailing State San Francisco California • Mailing Postal Code Mailing Postal Code Extension Mailing Country •	* Applicant First Name	Applicant Middle Name
Corporation, Partnership, DBA Mailing Care Of Mailing Street Number Image: Corporation Mailing Street Fraction Mailing Street Fraction Mailing Street Name Mailing Street Name Mailing Street Name Mailing Street Type Street Mailing Unit Type Mailing City San Francisco Mailing Postal Code Mailing Country		
Mailing Care Of • Mailing Street Number Mailing Street Fraction Mailing Street Pre-Direction Image: Mailing Street Name • Mailing Street Type • Mailing Street Name • Mailing Street Type • Mailing Unit Type Mailing Unit Number Image: Mailing City • Mailing State • Mailing Postal Code Mailing Postal Code Extension • Mailing Country • Mailing Country	* Applicant Last Name	Applicant Title
Mailing Care Of • Mailing Street Number Mailing Street Fraction Mailing Street Pre-Direction Image: Mailing Street Name • Mailing Street Type • Mailing Street Name • Mailing Street Type • Mailing Unit Type Mailing Unit Number Image: Mailing City • Mailing State • Mailing Postal Code Mailing Postal Code Extension • Mailing Country • Mailing Country		
Mailing Street Fraction Mailing Street Pre-Direction None • Mailing Street Name • Mailing Street Name • Mailing Street Type Mailing Unit Type None Mailing City • Mailing City • Mailing Postal Code Mailing Postal Code Mailing Country	Corporation, Partnership, DBA	
Mailing Street Fraction Mailing Street Pre-Direction None • Mailing Street Name • Mailing Street Type Mailing Unit Type None Mailing City • Mailing City • Mailing Postal Code Mailing Postal Code Mailing Country	Mailing Care Of	* Mailing Street Number
NoneNone * Mailing Street Name * Mailing Street Type Image: Street Street Mailing Unit Type Mailing Unit Number None Image: Street * Mailing City * Mailing State San Francisco California * Mailing Postal Code Mailing Postal Code Extension Mailing Country Mailing Country		
• Mailing Street Name • Mailing Street Type • Mailing Unit Type Street • Mailing Unit Type • Mailing Unit Number • None • • Mailing City • Mailing State San Francisco California • Mailing Postal Code Mailing Postal Code Extension • Mailing Country •	Mailing Street Fraction	Mailing Street Pre-Direction
Street Mailing Unit Type None * Mailing City * Mailing City San Francisco * Mailing Postal Code Mailing Postal Code Mailing Country	None	✓None ✓
Mailing Unit Type None * Mailing City * Mailing City San Francisco * Mailing Postal Code * Mailing Postal Code Mailing Country	* Mailing Street Name	* Mailing Street Type
None * Mailing City * Mailing City San Francisco * Mailing Postal Code * Mailing Postal Code Mailing Postal Code Mailing Country		Street
 Mailing City Mailing State California Mailing Postal Code Mailing Postal Code Extension Mailing Country 	Mailing Unit Type	Mailing Unit Number
San Francisco California * Mailing Postal Code Mailing Postal Code Extension Mailing Country Mailing Country	None	~
* Mailing Postal Code Extension Mailing Country	* Mailing City	* Mailing State
Mailing Country	San Francisco	California 🗸
	* Mailing Postal Code	Mailing Postal Code Extension
United States of America	Mailing Country	
	United States of America	~

6. For the *Vessel Information* page of the application, the below table summarizes the dynamic field display logic based on the Taxpayer selections:

User Selection	Associated Required Fields Displayed on the Form
	Vessel Name
	Port of Documentation
	Fish and Game Boat Number
United States Coast Guard	Vessel Activity
	Commercial Fishing
	Fish and Game Boat Number
	Commercial Passenger Fishing

User Selection	Associated Required Fields Displayed on the Form
	CF Number
	Fish and Game Boat Number
California Department of	Vessel Activity
Motor Vehicles	Commercial Fishing
	Fish and Game Boat Number
	Commercial Passenger Fishing

7. The Taxpayer completes the *Vessel Information* section of the form. The Taxpayer enters the required information marked with a red asterisk (*) before proceeding to the next step, then clicks the *Next* button.

	BOE-576-E: AFFIDAVIT FOR 4 PERCENT A	SSESSMENT OF CERTAIN VESSELS
complete the following, as applica	ble:	
The applicant or organization is the owne	r of a vessel that is:	
registered by the California Department of M	otor Vehicles	~
F number:		
he vessel is engaged or employed <i>exclus</i>	ively in one or more of the following activities:	
Commercial Fishing	Oceanographic Research	Commercial Passenger Fishing
aking and possession of fish or other living isource of the sea for commercial purposes.	Instruction or research studies as an oceanographic research vessel. Attach evidence of official classification by United States Department of Homeland Security or Coast Guard, and attach a contract, statement, or agreement from a recognized college, university, government agency, private foundation, or organization outlining the nature of research and time duration.	Carrying or transporting seven or more people for hire for commercial passenger fishing purposes, and holds a current certificate of inspection issued by the United States Coast Guard (attach a copy). A vessel shall not be deemed to be engaged or employed in activities other than the carrying or transporting of seven or more persons for hire for commercial passenger fishing purposes by reason of that vessel being used occasionally for dive, tour, or whale-watching purposes. For purposes of this subdivision, occasionally means 15 percent or less of the total operating time logged for the immediately preceding assessment year.
ish & Game Boat Number		If Commercial Fishing or Commercial Passenger Fishing are checked above, provide the Fish & Game Boat Number

	BOE-576-E: AFFIDAVIT FOR 4 PERCENT	ASSESSMENT OF CERTAIN VESSELS	
Complete the following, as applica	ble:		
* The applicant or organization is the owne	r of a vessel that is:		
documented by the United States Coast Gua	ırd		~
* Vessel name:		* Port of documentation:	
		San Fransisco	
Commercial Fishing Taking and possession of fish or other living resource of the sea for commercial purposes.	Oceanographic Research Instruction or research studies as an oceanographic research vessel. Attach	Commercial Passenger Fishing Carrying or transporting seven or more people for hire for commercial passenger fishing	
The vessel is engaged or employed <i>exclusi</i>	ively in one or more of the following activities:		
resource of the sea for commercial purposes.	oceanographic research vessel. Attach evidence of official classification by United States Department of Homeland Security or		
	Coast Guard, and attach a contract, statement, or agreement from a recognized college, university, government agency, private	Guard (attach a copy). A vessel shall not be deemed to be engaged or employed in activities other than the carrying or transporting of seven	
	foundation, or organization outlining the nature of research and time duration.	or more persons for hire for commercial passenger fishing purposes by reason of that vessel being used occasionally for dive, tour, or	
		whale-watching purposes. For purposes of this subdivision, occasionally means 15 percent or	
		less of the total operating time logged for the immediately preceding assessment year.	
Fish & Game Boat Number		If Commercial Fishing or Commercial Passenger Fishing	070
		If Commercial Fishing or Commercial Passenger Fishing checked above, provide the Fish & Game Boat Number	ale

- 8. Depending on the vessel engagement selection, the Taxpayer may be required to upload documentation to help processing of the form and select the acknowledgement checkbox.
- 9. The following table summarizes the type of documentation to be uploaded:

User Selection	Associated Documentation
Commercial Fishing	N/A
Oceanographic Research	Evidence of official classification by United States Department of Homeland Security or Coast Guard, and have attached a contract, statement, or agreement from a recognized college, university, government agency, private foundation, or organization outlining the nature of research and time duration
Commercial Passenger Fishing	Current certificate of inspection issued by the United States Coast Guard

BOE	576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMEN	NT OF CERTAIN VESSELS
pload File(s)		
Browse No file selected.		Based on your previous response, you're required to submit supporting information. Please choose your file(s) below then click the Upload document button
Lupload document	Update Date/Time	
I have uploaded a current certificate of inspection issu	ued by the United States Coast Guard*	
Save A Print PDF		✓ Previous Next ▶
RALINFORMATION FILING YEAR APPLICAN	TINFORMATION VESSEL INFORMATION VESSEL UPLOAT	D CERTIFICATION
	TINFORMATION VESSEL INFORMATION VESSEL UPLOAT	-
		-
BOE-		-
BOE-		-
BOE-3		NT OF CERTAIN VESSELS
BOE-		NT OF CERTAIN VESSELS
BOE- pload File(s) Browse No file selected. Upload document Action Document Name Thave uploaded evidence of official classification by U	576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMEN	AT OF CERTAIN VESSELS

10. The Taxpayer signs and submits the form by clicking the *Submit* button.

Certification			
Signature of Applicant	Signature Date		1 certify (or declare) under penalty of perjury under the
Applicant Title	The Signature Dat	e will be populated upon submission.	 laws of the State of California that the foregoing and all information contained herein, including any accompanying statements or documents, is true, correct, and complete to the best of my knowledge and belief.
Mr.			
mi.	Whom should we contact during	n normal business bours for additional	information?
	Whom should we contact durin E-mail Address	ıg normal business hours for additional Daytime Telephone	information?
		-	information?
Name	E-mail Address	-	information?
Name Form Submission	E-mail Address	Daytime Telephone	information?
Name Form Submission	E-mail Address	Daytime Telephone	information?

11. A completion certificate is issued to the Taxpayer. The Taxpayer can click the *View Statement* link to view the detailed statement.

	- 1
Certification Complete	
Thank you for electronically filing. Listed below is your confirmation number.	
Statement Type: BOE-576-E - Vessel Exemption Property Id: Confirmation Number Date of Submission: 11/22/2021 10:02 AM	
You may view your e-Filed statement by clicking "View Statement" below.	
Home Print View Statement Link to view submitted statement	
	_

12. The Taxpayer receives an email informing them of their filing along with details related to the statement.

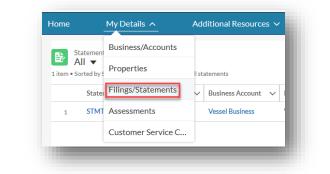
To	Fri 11/6/2020 4:37 AM noreply@salesforce.com on behalf of NoReply.Assessor-Recorder@sfgov.org Sandbox: The San Francisco Assessor-Recorder Office Has Received Your Filed Statement
	AT AND COUNTROL OF
	Statement Type: BOE-576-E - Vessel Exemption Property Id: Confirmation Number: Date of Submission: 11/6/2020 12:36 PM

13. The Taxpayer receives an automated exemption approval or denial notice via email.

Amending a Filed Statement

This section details the process that a Taxpayer can follow to amend an existing statement. Post amendment, a new statement is created from the previously submitted statement.

 The Taxpayer can access a previously filed statement by navigating to the *My Details* menu and clicking the *Filings/Statements* menu item. The Taxpayer can click the *Statement Number* to view its details.

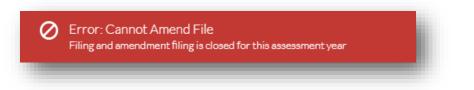


A	tatements \ ▼ orted by Statement Numb	er e Filtered hv all st	tatements										
	Statement N 1 V			Property	~	Form	~	Status	\sim	File Date	~	Assessme 🗸	Filing Me 🗸
1	1		Vessel Business		ĺ	BOE-576-E - Vessel Exemption		Submitted		7/29/2020		2020	eFile

2. The Taxpayer clicks the *Amend this Filing*? button to modify an existing statement. This feature can be used for amending BPP electronic filings as long as assessment year is still open to accept amendments. For exemptions, the Taxpayer can submit amendments, and ASR can process these as allowed by policy and law.

				Amend this Filing?
• NERAL INI	FORMATION	• FILING YEAR	APPLICANT INFO	RMATION VESSEL INFORMATION VESSEL UPLOAD CERTIFICATION
				OE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS
Conora	I Informatio			
Genera	Informatio	1		
	and Taxation Co (in any of the fo		ates: "A documented	vessel, as defined in Section 130, shall be assessed at 4 percent of its full cash value only if the vessel is engaged or employed
(a) In the ta	aking and posse	ssion of fish or of	ther living resource o	the sea for commercial purposes.
(b) In instru	uction or resear	ch studies as an o	oceanographic resea	rch vessel.
(c) In carry	ing or transport	ng seven or more	e people for hire for c	ommercial passenger fishing purposes and holds a current certificate of inspection issued by the United States Coast Guard.
that vesse		asionally for dive		ities other than the carrying or transporting of seven or more persons for hire for commercial passenger fishing purposes by reason of ing purposes. For purposes of this subdivision, 'occasionally' means 15 percent or less of the total operating time logged for the
Section 25	i4 by 5 p.m. on i	ebruary 15 of the	calendar year in wh	aiming classification of a vessel as a documented vessel eligible for assessment under Section 227 fails to file the affidavit required by ch the fiscal year begins, but files that affidavit on or before the following August 1, the assessment shall be reduced in a sum equal to 80 fidavit been timely filed."
🛛 🖾 Prin	t PDF			Next 🕨

a. If the assessment year is not open to accept amendments, the Taxpayer sees the following error message when clicking Amend this Filing?



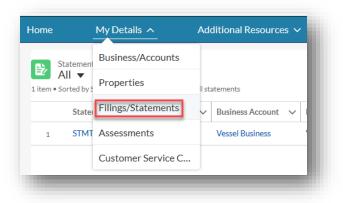
3. Taxpayer can update the form, upload the file, sign it and click the *Submit* button. The *Date of Submission* on the certificate updates to reflect current date and time.

•	•	•	•	•
NERAL INFORMATION	FILING YEAR	APPLICANT INFORMATION	VESSEL INFORMATION	CERTIFICATION
	BOE 576 5			
	BUE-5/6-E	AFFIDAVIT FOR 4 PERC	ENT ASSESSMENT OF	CERTAIN VESSELS
Certification				
1 certify				oregoing and all information contained herein, o the best of my knowledge and belief.
* Signature of Applica	nt			
Signature Date				
The Signature Date will be J	populated upon submi	ssion.		
Applicant Title				
Owner				
	Whom sho	uld we contact during norm	al business hours for add	itional information?
	Whom sho	uld we contact during norm	al business hours for add E-mail Address	itional information?
Owner	Whom sho	uld we contact during norm		itional information?
Owner Name	Whom sho	uld we contact during norm	E-mail Address	itional information?
Owner Name	Whom sho	uld we contact during norm	E-mail Address	itional information?
Owner Name Daytime Telephone	Whom sho	uld we contact during norm	E-mail Address	itional information?
Owner	Whom sho	uld we contact during norm	E-mail Address	itional information?
Owner Name Daytime Telephone Form Submission		uld we contact during norm	E-mail Address	
Owner Name Daytime Telephone Form Submission	t all the required info		E-mail Address	
Owner Name Daytime Telephone Form Submission Once you have filled our	t all the required info		E-mail Address	
Owner Name Daytime Telephone Form Submission Once you have filled our	t all the required info		E-mail Address	form.

4. The Taxpayer can print the certificate or save the certificate as a PDF on their local computer by clicking the *Print* button. The Taxpayer can view the certificate within the Community Portal by clicking the *View Statement* button.

Certification Complete	
Thank you for electronically filing. Listed below is your confirmation number.	- 82
Statement Type: BOE-576-E - Vessel Exemption Property Id: Confirmation Number: Date of Submission: November 2, 2020 You may view your e-Filed statement by clicking "View Statement" below.	I
Tou may view your e-ried statement by circking "view statement" below.	- 82
Print View Statement	J

5. The Taxpayer can view the amended statement by navigating to the *My Details* menu and clicking the *Filings/Statements* menu item. The amended statement has the *Amended From* information associated with it.



	itatements											
ems •	Sorted by Statement Numb	er • Filtered by all staten	ients									
	Statement N 1 🗸	Amended From \checkmark	Business Account 🗸	Property	✓ Form	\sim	Status	\sim	File Date	Assessm V	Filing M	~
			Vessel Business		BOE-576-E - Vessel Exemption		Submitted		7/29/2020	2020	eFile	
1												

Filing an Institutional Exemption

This section details the process to file an institutional exemption on the Community Portal. The following exemptions are available for the Taxpayer to file:

#	Form Name				
1	BOE-267-S - Religious Exemption				
2	2 BOE-267-A- Welfare Exemption (Annual)				
3	BOE-267- Welfare Exemption (First Filing)				
4	BOE-260 - Work of Art Exemption				
5	BOE-268-B - Free Public Library or Museum Exemption				
6	BOE-262-AH - Church Exemption				
7	BOE-264-AH - College Exemption				

1. On the Community Portal Home page, the Taxpayer clicks the BPP *Property Name* for which an exemption needs to be filed.

ne	My Details 🗸	Additional Resources 🗸		
	We	On our new web portal, you can e	ty of San Francisco Assessor-Re lectronically file your Statements and Exemptions F and Property Locations, as well as create customer	orms, review and manage
lo get sta				nd on the Notice to File that was mailed this year. Once a Business Account is
To reque:	est a Replacement PIN st a replacement Entity ID and r service case with our office.		a replacement notice. You may request this by navigating to the	a Additional Resources tab above and selecting General Inquiry which will create a
	sing Additional Inform access additional information		My Details tab above. There you can also view your past filings, a	assessment history, and any customer service cases.
			Add Account/Property	
To file BP	Statements and View P statements and/or exempti s linked to view information ar	ns forms, select the appropriate Property listed below	and choose the File Property Statements or File Exemptions tal	b to access our online filing system. You can also click on any of the Properties or
Accounts				
	Accounts/Businesse:			
perties	Accounts/Businesse: operties ly Properties			
perties	operties ly Properties	ad by All properties - Type, Record Type + Updated a minut	1 ago	ď
Perties Pr M items • Si	operties ly Properties		V Status	C ^a
Pr Pr M items • Si F 1	operties ly Properties orted by Property Name • Filter		Status Active	
Perties Pr M items • Si	operties ly Properties orted by Property Name • Filter		V Status	

2. The Taxpayer clicks the *File Exemptions* tab.

р	ease select from the o		how that this is yo /pe of business yo	-	launch the correct fo	rm.
elect Type of Property or Busi	ness					
Financial institution or Insura	nce company (BOE 571-L + B	OE 571-LA)		•		
ote: The tax rate is the same	regardless of which form	you fill out.				Next

3. The Taxpayer selects an exemption type and clicks the *Next* button.

·
Next

4. The below table summarizes the various sections for each type of exemption form. Once the form is selected, the first page displayed contains the *Instructions* for the form. The Taxpayer reads the instructions to determine all requirements to file the needed exemption.

#	Form Name	Sections of the Form	Conditions for Submission
1	BOE-267-S - Religious Exemption	Instructions Filing Years Applicant Info Property Info Use of Property Contact Info Certification	 The Instructions section explains all of the requirements and conditions for filing this exemption. The <i>Submit</i> button on the <i>Certification</i> page does not appear if these conditions are not met: On the <i>Use of Property</i> page, question #7: <i>Is there a sanctuary (church) on or adjacent to this property?</i> On the <i>Use of Property</i> page, question #9: <i>Are bingo games being operated on this property?</i>
2	BOE-267-A- Welfare Exemption (Annual)	Instructions Filing Info Property Info	The <i>Submit</i> button on the <i>Certification</i> page does not appear if these conditions are not met:

#	Form Name	Sections of the Form	Conditions for Submission
		Exemption Info (P.1) Exemption Info (P.2) Contact Info Certification	• On the Exemption Info (P.2) page, question #5: Is any portion of the property used for living quarters (other than transitional or emergency shelter, low-income housing or housing for the elderly or handicapped listed under questions 6 or 7)?
			• On the <i>Exemption Info (P.2)</i> page, question #6: <i>Is this property used as</i> <i>low-income housing?</i>
			 On the Exemption Info (P.2) page, question #7: Is this property used as a housing for the elderly or handicapped?
			• On the <i>Exemption Info (P.2)</i> page, question #8: <i>Do other persons or</i> <i>organizations use any of this</i> <i>property?</i>
			• On the Exemption Info (P.2) page, question #9: Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code?
			• On the <i>Exemption Info (P.2)</i> page, question #10: <i>Have the organization's</i> <i>income and/or expenses increased by</i> <i>more than 25 percent since last year?</i>
3	BOE-267- Welfare Exemption (First Filing)	Instructions Filing Info Property Identification Property Type(s) Use of Property	 The <i>Submit</i> button on the <i>Certification</i> page does not appear if these conditions are not met: On the <i>Filing Info</i> page, question: <i>Filed For OCC With The Board</i>?
		Exemption Info Contact Info Certification	Please refer to the <i>Instructions</i> page to see all requirements for this exemption.
4	BOE-260 - Work of Art Exemption	Instructions Filing Year Claimant Info Work of Art Info	N/A

#	Form Name	Sections of the Form	Conditions for Submission
		Certification Director Certification	
5	BOE-268-B - Free Public Library or Museum Exemption	Filing Info Addresses Exemption Info Attachments Owned Property Contact Info Certification	Please refer to the <i>Instructions</i> page to see all requirements for this exemption
6	BOE-262-AH - Church Exemption	Filing Info Addresses Church Info (P.1) Church Info (P.2) Contact Info Certification	 The Submit button on the Certification page does not appear if these conditions are not met: On the Church Info (P.1) page, question #6: School or Day Care Operated at this Location? On the Church Info (P.2) page, question #9: Are bingo games being operated on this property? On the Church Info (P.2) page, question #10: Is any portion of this property being used for living quarters for any person?
7	BOE-264-AH - College Exemption	Filing Info Addresses Property Info (P.1) Property Info (P.2) Attachments Certification	Please refer to the <i>Instructions</i> page to see all requirements for this exemption

5. The Taxpayer navigates to the form. The Taxpayer reads the *Instructions* and completes the various sections of the form. The Taxpayer must provide information marked with a red asterisk (*) before proceeding to the next step. On each page of the forms, the Taxpayer can click the *Save* button to save the changes and click the *Print PDF* button to print the form in PDF format. The Taxpayer can also return to the previous page of the form by clicking the *Previous* button. When all required fields are entered in the current page of the form, the Taxpayer clicks the *Next* button to proceed to the next page. *Note*: Navigating to a different section by clicking on the section in the status bar does not save the contents. The Taxpayer must click the *Save* button to actually save the contents entered so far.

Below are examples of the Religious Exemption form pages.

6. *Instructions*: Upon selecting *BOE-267-S - Religious Exemption*, the *Instructions* for filing this form are displayed. The Taxpayer reads all of the instructions to understand the required information for filing this form. The Taxpayer clicks the *Next* button to proceed to the next step.

INSTRUCTIONS	FILING YEARS	APPLICANT INFO	PROPERTY INFO	USE OF PROPERTY	CONTACT INFO	CERTIFIC.
INSTRUCTION	5 FOR FILING A C	LAIM FOR RELIGI	DUS EXEMPTION	FROM PROPERTY	TAX	
		BOE-267-S: I	RELIGIOUS EXEMP	TION		
This affidavit is requ Taxation Code.	uired under the provis	ions of sections 206.1,	207, 207.1, 214.4, 251,	255, 257, 257.1, 260, 27	0, and 271 of the Reve	nue and
GENERAL INFORM	ATION					
includes religious w schools of collegiate religious worship a	orship and school put e grade and less than nd operates a school, poses only, where the	poses, including presc collegiate grade. The ex provided that the owne	hools, nursery schools cemption is also availa er church continues to	n and used exclusively fi , kindergartens, schools ble if another church use conduct worship service r the Religious Exemptio	of less than collegiate es the property part tin is on the property. Pro	grade, or me for perty
		e Religious Exemption te the exemption when		ne annual mailing of a ten also a part of the law.	rmination notice by th	e
FILING OF AFFIDA	/IT					
		nust be filed with the Astronomic the Astronomic tension (1997) and the exemption	, , , , , , , , , , , , , , , , , , ,	5. (Section 270 provides a terminated.	a partial exemption for	r late
IDENTIFICATION C	F APPLICANT					
	ate or organization na ate identification num		ng exemption on the p	roperty. Include the mai	ling address, website a	address
IDENTIFICATION O	F PROPERTY					
Identify the location	n of the property for w	hich you are seeking e	kemption. A separate	claim form must be filed	for each location.	
USE OF PROPERTY						
Please answer all q	uestions in this section	n of the claim form.				
				the Church Exemption, t Religious Exemption, pl		
religious worship organization's prop church's religious p	services. The Church erty must be used sol urposes. The welfare	Exemption is the most ely for religious worshi exemption may be clair	restrictive of the three o and other activities r ned on property that i	y a religious organizatior exemptions available to easonably necessary for s used for other than rel h property is used regul	a church since the the accomplishment o igious worship and scl	of the
Save 🛛 🖄 Pr	int PDF					Next 🕨

7. Filing Years: The Taxpayer provides information marked with a red asterisk (*). The Taxpayer can click the Save button to save the changes and click the Print PDF button to print the form in PDF format. The Taxpayer can also return to the previous page of the form by clicking the Previous button. When all required fields are entered in the current page of the form, the Taxpayer clicks the Next button to proceed to the next page.

This claim is filed for fiscal year 20 20	J
	BOE-267-S: RELIGIOUS EXEMPTION
	BOE-267-S: RELIGIOUS EXEMPTION
Example: a person filing a timely claim in January 20	BOE-267-S: RELIGIOUS EXEMPTION 11 would enter "2011" in Claim Fiscal Year From and "2012" in Claim Fiscal Year To).
Example: a person filing a timely claim in January 20' ' Claim Fiscal Year From	
	11 would enter "2011" in Claim Fiscal Year From and "2012" in Claim Fiscal Year To).

8. *Applicant Info*: The Taxpayer provides information marked with a red asterisk (*), then clicks the *Next* button to proceed to the next page.

BOE-267-S: RELI	GIOUS EXEMPTION
dentification of Applicant	
Corporate or Organization Name of Church	Local Church Name
Corporate ID (If Any)	Website Address (If Any)
Mailing Address	
Nailing Care Of	* Mailing Street Number
Nailing Street Fraction	Mailing Street Pre-Direction
None 🗸	None 🗸
Mailing Street Name	* Mailing Street Type
	Street 🗸
Nailing Unit Type	Mailing Unit Number
None 🗸	
' Mailing City	* Mailing State
San Francisco	California 🗸
Mailing Postal Code	Mailing Postal Code Extension
^t Mailing Country	
United States of America 🗸	

9. *Property Info*: The Taxpayer provides information marked with a red asterisk (*), then clicks the *Next* button to proceed to the next page.

	BOE-267-S: RELIGIOUS EXEMPTION
Property Address	
Care Of	* Street Number
Street Fraction	Street Direction
None	✓None ✓
Street Name	* Street Type
	Street 🗸
Unit Type	Unit Number
None	v
* City	* State
San Francisco	California
* Zip Code	Zip Extension
Assessor's Daysol Number	
Assessor's Parcel Number	
Assessor's Parcel Number	
Identification of Property	
Identification of Property	
Identification of Property BPP Account Number	
Identification of Property BPP Account Number	
Identification of Property BPP Account Number * 1. Is this real property owned by the church? Yes	
Identification of Property BPP Account Number • 1. Is this real property owned by the church? Yes	
Identification of Property BPP Account Number * 1. Is this real property owned by the church? Yes * If Yes, Enter the Date the Property was Acquired 10/28/2020	
Identification of Property BPP Account Number 1. Is this real property owned by the church? Yes If Yes, Enter the Date the Property was Acquired	
Identification of Property BPP Account Number * 1. Is this real property owned by the church? Yes * If Yes, Enter the Date the Property was Acquired 10/28/2020 * Enter date first used for Church/School Purposes 10/28/2020	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Identification of Property BPP Account Number *1. Is this real property owned by the church? Yes *If Yes, Enter the Date the Property was Acquired 10/28/2020 * Enter date first used for Church/School Purposes 10/28/2020 * Last the property is owned by an entity organized and operating output of the purposes.*	ating exclusively for 🛛 🖬 2b. The entity is a nonprofit organization*
Identification of Property BPP Account Number • 1. Is this real property owned by the church? Yes • If Yes, Enter the Date the Property was Acquired 10/28/2020 • Enter date first used for Church/School Purposes 10/28/2020 2 2a. The property is owned by an entity organized and operative of the property	ating exclusively for 🛛 🖬 2b. The entity is a nonprofit organization*

10. **Use of Property**: The Taxpayer provides information marked with a red asterisk (*). For some of the answers, other required fields are displayed that require entry based on the answer provided. When complete, the Taxpayer clicks the **Next** button to proceed to the next page.

	BOE-267-S: RELIGIOUS EXEMPTION
3 Are all buildings equir	ipment, and land claimed used exclusively for religious purposes?
	hundrid and reactions and an and an and an and
•	
Yes	v
4. Is there any portion of	of the property currently under construction?
No	~
5. Has any new construc	ction been completed on this property since January 1, 12:01 a.m. last year?
No	~
6. Does the real property	ty include property used for parking purposes?
0. Does the rear property	
•	
Yes	v
If Yes, is all real property own exemption is claimed for park	ned by or leased to the church, upon which king purposes, necessarily and reasonably
required for parking of autom religious worship or religious a	activity, and which is not at other times used
for commercial purposes?	
Yes Note: Commercial purposes does not	ot include the parking of vehicles or bicycles, the revenue
of which does not exceed the ordinar the property for parking purposes.	ry and necessary costs of operating and maintaining
7. Is there a sanctuary (c	church) on or adjacent to this property?
	,
•	
Yes If No, a claim for Welfare Exemption	n must be filed with the Assessor by February 15 each
year for the property or portion of th	he property.
Select, as applicable, the	e type(s) of schools being operated on this property.
School Type(s)	
Preschool	
Nursery school Kindergarten	
Elementary In order to chose multiple selections	s please hold down ctrl (windows) or command (mac)
and click on the relevant options.	
9. Are bingo games bein	ng operated on this property?
Yes	~
If Yes, a claim for Welfare Exemption year for the property or portion of th	n must be filed with the Assessor by February 15 each he property.
year for the property or portion of th	he property.
year for the property or portion of th	nmuit de filed with the Assessor by February 15 each ne property. • other property at this location being leased or rented from someone else?
year for the property or portion of th	he property.
year for the property or portion of th 10. Is any equipment or • No	e property. other property at this location being leased or rented from someone else?
year for the property or portion of th 10. Is any equipment or No If Yes, list in the remarks section the model, and serial number of the prop	he property.
year for the property or portion of th 10. Is any equipment or No Yes, list in the remarks section the model, and serial number of the prog Religious Exemption if the personal p	reproperty. other property at this location being leased or rented from someone else? reme and address of the owner, and the type, mask, operty. Nato: Leased personal property: a eligible for the property is used exclusively for millious purposes.
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yeer for the property or portion of th 10. Is any equipment or No We, Is in the remorts section the mode, on serior in the the the section of the Religious Evemption of the personal p 11.Is any portion of this No	reproperty. reproperty at this location being leased or rented from someone else? reproperty at this location being leased or rented from someone else? reproperty. Note: Locate person of the type, make, property used for living quarters for any person?
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11. **Contact Info**: The Taxpayer provides information marked with a red asterisk (*), then clicks the **Next** button to proceed to the next page.

B	OE-267-S: RELIGIOUS EXEMPTION
Whom should we contact during normal busine	ess hours for additional information?
Name	* Title
Daytime Telephone	Chief Officer • Email Address

12. **Certification**: The Taxpayer provides information marked with a red asterisk (*). If the **Submit** button is not available, this indicates that the prerequisite information has not been provided. The Taxpayer can click on the **Instructions** section to review the instructions for all required information needed to file this form.

	BOE-267-S: RELIGIOUS EXEMPTION	
ertification		
Claimant Name - First	Claimant Name - Middle	I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing
Claimant Name - Last	* Claimant Title	and all information contained herein, including any accompanying statements or documents, is true, correct, and complete to the best of my knowledge and belief.
ame of Person Making Claim	C	
Signature	Signature Date	
	The Signature Date will be populated upon submission.	
IIS STATEMENT IS SUBJECT TO AUDIT		

13. *Certification*: Once all required information has been provided, the Taxpayer signs and submits the form by clicking the *Submit* button.

Claimant Name - Last * Claimant Title including any accompanying statemed documents, is true, correct, and complete and belief. Cowner Owner of my knowledge and belief.	tion		
Chain and Filte documents, is true, correct, and complete of my knowledge and belief. Name of Person Making Claim Signature Date Signature Image: Signature Date	Name - First	Claimant Name - Middle	I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information contained herein,
Name of Person Making Claim * Signature Signature Date	Name - Last	* Claimant Title	including any accompanying statements or documents, is true, correct, and complete to the best
* Signature Date	son Making Claim	Owner	of my knowledge and belief.
The Signature Date will be populated upon submission.	-	Signature Date	
······································		The Signature Date will be populated upon submission.	
THIS STATEMENT IS SUBJECT TO AUDIT	ENT IS SUBJECT TO AUDIT		
Form Submission	bmission		
Once you have filled out all the required information in each section, you will be able to submit this form.	ave filled out all the required information	n in each section, you will be able to submit this form	

14. A completion certificate is issued to the Taxpayer. The Taxpayer can click the *View Statement* link to view detailed statement and the *Print* link to print the certificate.

	I
Certification Complete	
Thank you for electronically filing. Listed below is your confirmation number.	
Statement Type: BOE-267-S - Religious Exemption Property Id: Image: Confirmation Number: Date of Submission: 11/22/2021 10:12 AM	I
You may view your e-Filed statement by clicking "View Statement" below.	
Home Print View Statement	

15. The Taxpayer receives an email informing them of their filing along with details related to the statement.



Generating a Valuation Report

This section details the process for a taxpayer to generate a Valuation Report.

1. The Taxpayer logs into the Community Portal. From the Home Page, the Taxpayer navigates to *Assessments* menu item within the *My Details* menu.

	My Details A A	dditional Resources V
	Business/Accounts	
	Properties	to the City and County of San Francisco Assessor-Recorder's new web portal
	Filings/Statements	your Business Accounts and Property Locations, as well as create customer support cases.
	Assessments	
Getting So To get started you will be ab	Customer Service Cases	Jusiness Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed this year. Once a Business Account is linked, ties below. You may also link multiple Accounts and Properties.
To request a r	Replacement PIN eplacement Entity ID and Access rice case with our office.	PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create a
	Additional Information s additional information about yo) ur Accounts and Properties by clicking on the My Details tab above. There you can also view your past filings, assessment history, and any customer service cases.
		Add Account/Property

2. The Taxpayer clicks *Print Assessment Details* button.

lf yo	ur Assessment is in 'Notic		about it, please contact us before enrollment. nto the Assessment Case Number below and	You also have the ability to waive your notice p navigating to the 'Waive Notice Period' tab.	eriod if you'd like to receive your
		To Print the Details o	of the Assessment. <u>click the "Print Assessment Details"</u> Print Assessment Details	button and select the assessments	
	Cases My Assessments • Sorted by Case Number • Filtere	d by All cases - 5 more filters applied + Updated a f	ew seconds ago		C
	Case Number 1	✓ Assessment Year	✓ Property	✓ Su	b-Status 🗸
1	01415617	2021		Co	mpleted
2	01424559	2020		Ca	mpleted
3	01424561	2021		Ca	mpleted
4	01480849	2021		Co	mpleted
5	01480850	2020		Ce	mpleted
5		2020			ticing

3. The Taxpayer selects one or more Assessments by clicking the + sign, and then clicks the *Finish* button.

		Print Assessment Sel	ection Menu		
3 Item(s	s) Selected				
_	Case Number	Assessment Year	Property	Sub Status	
+					×
+					×
+	01424561	2021		Completed	×
+	01480849	2021		Completed	×
+	01480850	2020		Completed	×
+	01480868	2020		Noticing	×
				Cancel	Finish

• The SMART System opens up a new tab in the browser with the Valuation Reports generated as PDF files.

				s + 🗊	*				
PrintAssessmentDetails		/3	- 100%	; + ⊡	<u>ي</u>				
	Joaquin To Assessor-Rei			and the second se	O CONTRACTOR	FFICE OF	SAN FRAI THE ASSE		ORDER
				VALU		r			
								Statu	s: Final
	Entity ID		ssessment umber	P	operty Id	Prope	erty Name	Proc	essed Date
	_							9/30/	2021
	Assessment Year:	2021							
	Asset Classification Leasehold		% Fixture		Adjusted Cost Facto		Fixtures Values	PP value	Total Market Value
	Improvements - Structure	NA	100	2019	13,180	101	13,317	0	13,317
_				Sub Total	13,180		13,317	0	13,317
And a second sec	Machinery & Equipment	15	50	2019	20,081	90	9,037	9,036	18,073
				Sub Total	20,081		9,037	9,036	18,073
	Office Furniture & Equipment	12	0	2019	5,000	86	0	4,300	4,300
				Sub Total	5,000		0	4,300	4,300
	Supplies	99	0	2019	500		0	500	500

Claiming Accounts and Properties

This section details the process for a Taxpayer to claim their Accounts and Properties in order to manage and electronically file statements for them.

1. On the Community Portal Home page, the Taxpayer clicks the *Add Account/Property* button to add Accounts and Properties to their portal.

1	My Details 🗸	Additional Resources 🗸
	We	Icome to the City and County of San Francisco Assessor-Recorder's new web portal On our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage your Business Accounts and Property Locations, as well as create customer support cases.
	itarted in Commun d, click the button below t	hty to link your Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed this year. Once a Business Account is
iked, you w	ill be able to see all the as	sociated Properties below. You may also link multiple Accounts and Properties.
equest a	a Replacement PIN	N d Access PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create
equest a request a stomer ser	a Replacement PIN replacement Entity ID and vice case with our office.	N d Access PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create
equest a request a istomer ser	a Replacement PIN replacement Entity ID and vice case with our office. g Additional Inforr	N d Access PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create
equest a request a stomer ser	a Replacement PIN replacement Entity ID and vice case with our office. g Additional Inforr	N d Access PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create mation

2. The Taxpayer enters the *Entity ID, Access PIN* and clicks the *Submit* button. These details are included in the annual *Notice to File*. An Entity ID is provided for the Account that the Taxpayer can use to link an Account on the Community Portal.

	K Info to log into the San Francisco E-File Portal: Entity ID #: PIN #: Filing Due Date: April 1, 2021
	Entity ID #:
	PIN #:
	Filing Due Date: April 1, 2021
	Last Day To File Without Penalty: May 7, 2021
NOTICE OF DECURENTS	
NOTICE OF REQUIREMENT 2021 BUSINESS PROPERTY ST	
February 12, 2021	
Dear Business Owner:	
This Notice informs you of your business personal property filing obligat by the assessor to file for 2021. State law requires business owners to with the County Assessor for every business located within the County without incurring a penalty is May 7, 2021; penalty for filing after May of Treasurer & Tax Collector will mail tax bills for unsecured prop- will be due by August 31, 2021.	o file the Business Property Statement annually (R & T Code, Sec. 441(a)). The last day to file γ 7 th is 10% of total assessed value. The Office

	Link your ASR Account and Vessel Properties here	
intity ID 🚯		
123456		
locess PIN		
•••••		

3. Once the Account has been successfully linked, the Taxpayer can view the Property and Account /Business.

ne My Details 🗸	Additional Resources 🗸		
W	On our new web portal	County of San Francisco Assessor-F you can electronically file your Statements and Exemptions Accounts and Property Locations, as well as create custom	Forms, review and manage
			und on the Notice to File that was mailed this year. Once a Business Account is
sustomer service case with our offi	and Access PIN to view information online, ple ce. ormation	tase request a replacement notice. You may request this by navigating to t king on the My Details tab above. There you can also view your past filing	he Additional Resources tab above and selecting General Inquiry which will create a seesement history, and any customer service cases.
		Add Account/Property	
Filing Statements and Vi to file BPP statements and/or exen Accounts linked to view informatio	nptions forms, select the appropriate Property	listed below and choose the File Property Statements or File Exemptions	tab to access our online filing system. You can also click on any of the Properties or
perties Accounts/Busines	sses		
Properties My Properties	sses Itered by All properties - Type, Record Type • Upda	ted 27 minutes ago	
My Properties		ted 27 minutes ago Status 🗸 🗸	Account Name

			Θ
me	My Details 🗸	Additional Resources 🗸	
	We	Come to the City and County of San Francisco Assessor-Recorder On our new web portal, you can electronically file your Statements and Exemptions Forms, review your Business Accounts and Property Locations, as well as create customer support case	and manage
To get star linked, you		to link your Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice sociated Properties below. You may also link multiple Accounts and Properties.	to File that was mailed this year. Once a Business Account is
customer s	service case with our office		
		Add Account/Property	
To file BPP		ving Property Details ions forms, select the appropriate Property listed below and choose the File Property Statements or File Exemptions tab to access our o nd request updates.	online filing system. You can also click on any of the Properties or
operties	Accounts/Business	85	
My My	ounts y Accounts rted by Account Name • Filte	red by All accounts - Is Current User's Community Account • Updated a few seconds ago	
	ccount Name 1		Phone
1			
_			

Updating Account Information

This section details the process for a Taxpayer to update information for their account in the Community Portal.

1. On the Community Portal Home page, the Taxpayer clicks the *Accounts/Businesses* tab.

	AND.						9
lome	My Details	· •	Additional Resources 🗸				
		Welc		,	r Statements and Exempti	ons Forms, review and manage	eb portal
To get star		on below to li			y ID and Access PIN, which can b	e found on the Notice to File that was r	nailed this year. Once a Business Account is
To request	t a Replacem t a replacement En service case with o	ntity ID and Ad	ccess PIN to view information online, ple	ase request a replacement notice. Yo	u may request this by navigating	to the Additional Resources tab above	and selecting General Inquiry which will create a
	ing Additional inf		tion out your Accounts and Properties by click	ing on the My Details tab above. The	re you can also view your past fi	lings, assessment history, and any custo	mer service cases.
				Add Accou	unt/Property		
To file BPP Accounts I	statements and/o	or exemptions rmation and r		isted below and choose the File Prop	erty Statements or File Exempti	ons tab to access our online filing system	m. You can also click on any of the Properties or
🛄 My	Accounts/Bu						
	rted by Account Nar	me • Filtered b	y All accounts - Is Current User's Communit	y Account • Updated a few seconds ago)	✓ Phone	C
1	coontinaine T					Y Phone	
2		_					

2. Under *My Accounts*, the Taxpayer clicks the Account that needs to be updated.

Accounts My Accounts					
items • Sorted by Account Name • Filtered by All account	ts - Is Current Liser's Community Account • Lin	idated a few seconds ago			C
Account Name 1	~	Entity ID	\checkmark	Phone	~
1					
1					

3. The Taxpayer clicks the *Update Account Info* button to update relevant information.

me My Detai	ls ✓ Add	itional Resources 🗸			
Account				Update Account Info	Manage Mailing Address
Account Record Type Business Account	Entity ID	Business Status Active			
Account Information	_				
Account Name			Business Account Number 🕚		
Mailing Address			Contact Name		

4. In Update Account Info, the Taxpayer can provide updated information and click the *Save* button.

		×
	Update Account Info	
*Contact Name		
* Contact Email		
*Contact Phone		
		Cancel Save

5. The most up-to-date information is now available in the Community Portal.

			Account "	'was saved.	\boxtimes		0
ome My Details 🕥	 Addit 	ional Resources 🗸					
Account						Update Account Info	Manage Mailing Address
Account Record Type Business Account	Entity ID	Business Status Active					
ccount Details							
Account Information							
Account Name				Business Account Number	0		
Mailing Address				Contact Name			
Contact Phone				Contact Email			
Business Open Date				Business Close Date			

6. The Taxpayer can update mailing address associated with the Account by clicking the *Manage Mailing Address* button.

me	My Details	/ А	dditional Re	esources 🗸							
	int						Update Ac	count Info	Manaj	ge Mailing Addı	ress
Account Reco Business Acc		Entity ID	Busi Acti	ness Status ve							
ccount Deta											
	formation		_		Business Acco	unt Number 🚯				_	

7. The Taxpayer enters a new Address and Zip Code and enters <Tab> key which enables Validate with USPS. The Taxpayer clicks the Validate with USPS button. If the address provided is valid, it displays. The Taxpayer clicks the Use This Information button to assign the provided USPS address to the account, then clicks the Save button.

350 Bush St			^
* Zip Code			
94107			
Q Validate with USPS	K Clear Search		
USPS Result 350 BUSH ST SAN FRANCISCO US-CA			
Use This Information	X Clear Validation Result		
Care Of			
Street Number		Street Fraction	
350		None	•
Street Direction	Street Name	Street Type	
None 🔻	Bush	Street	•
Unit Type		Unit Number	. 1
None		▼]	
City	State	Zip Code	
San Francisco	California	94107	
Zip Extension			
	Lookup City & State		
Save Clear			

8. The updated information is reflected on the Community Portal.

Account					Update Account Info	Manage Mailing Address
_						
Account Record Type	Entity ID	Business Status				
Business Account		Active				
ccount Details						
Account Informatio	on					
Account Name			Business Account	0		
Account Name			Business Account Number	0		
Account Name Mailing Address		-		0		
	350 BUSH ST), CA 94104-2804	Number	0		
	350 BUSH ST	_	Number	0		_

Requesting Property Updates

This section details the process of how a Taxpayer can create a Customer Service Case in the Community Portal to report updates to information on their business property.

1. The Taxpayer can navigate to the list of properties by clicking the *Properties* tab on the Home page or by selecting *Properties* under *My Details* section in the menu bar.

Home	My Details 🔨	Additional Resources 🗸
	Business/Accounts Properties Filings/Statements	Te to the City and County of San Francisco Assessor-Recorder's new web portal On our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage
Getting To get star you will be	ted,	C our Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed this year. Once a Business Account is linked, Properties below. You may also link multiple Accounts and Properties.
To request	t a Replacement PIN t a replacement Entity ID and a service case with our office.	Access PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create a
	ing Additional Inform	nation bout your Accounts and Properties by clicking on the My Details tab above. There you can also view your past filings, assessment history, and any customer service cases.
		Add Account/Property
To file BPP	tatements and Viewi a statements and/or exemption linked to view information and	ns forms, select the appropriate Property listed below and choose the File Property Statements or File Exemptions tab to access our online filing system. You can also click on any of the Properties or
Properties	Accounts/Businesses	
	perties V Properties	
My My		C C
9 items • Sor		d by All properties - Type, Record Type • Updated 11 minutes ago V Status V Account Name V
9 items • Sor	rted by Property Name • Filtere	to by All properties - Type, Record Type + Opdated 11 minutes ago

2. The Taxpayer selects the business Property that needs to be updated from the list of Properties by clicking the Property Name.

	roperties 1y Properties Forted by Property Name • Filtere	d by All properties - Type, Record Type ♦ Updated a few seconds ago				C ⁴
	Property Name 🕇		Status	~	Account Name	~
1			Active			
2			Active			
3			Active			

3. The Taxpayer can click the *Request Property Updates* tab to update business information, provide associated information, and create a new customer service case.

Property							
Record Type Business Personal Property	Туре	Account Name	Entity Id	Doing Business As	Property ID		
ile Property Statements Please select a reason fro	File Exemptions	Details & Related	Request Property L	Jpdates			
[•] Update Reason Moved – outside of San Francise				•			
L	bmitted statement, o	click on 'Amend Your Fili	ng' button on the statem		ly submitted a statement this year	and would like to file your stateme	nt, please go to File Property

4. Taxpayer selects the reason for update and clicks the *Next* button to continue.

Record Type Business Personal Property	Туре	Account Name	Entity Id Do	ning Business As	Property ID
le Property Statements Please select a reason fr	File Exemptions	Details & Related	Request Property Update	es	
*Update Reason ✓ Moved – outside of San Fran Moved – within San Francisc Business Closed					

5. Taxpayer enters required information on the next screen, with fields displayed depending on the Update Reason selected on the prior screen. The Taxpayer can use the *Previous* button to change the Update Reason. All fields marked with a red asterisk (*) are required.

ne	My Details 🗸	Additio	nal Resources 🗸					
Propert	ty							
Record Type Business Perso	onal Property	Type	Account Name	Entity Id	Doing Business As	Property ID		
Property S	Statements File	Exemptions	Details & Related	Request Property	Updates			
	oported your P	usinoss os Mo	wed to a new Less	tion in Son Fran				
ounaven	eported your b	usiness as Mo	oved to a new Loca	acion in San Franc	.15CO.			
lease provide	the following informa	ition						
Date Busines	is Moved							
					苗			
Did Doing Busi	iness As Change?							
No					•			
Lease Terminat	ted?							
					•			
No								
	s Location Address (Sit	us) 🚯						
	s Location Address (Sit	us) 🚺						
	s Location Address (Sit	ıs) 👩						
	s Location Address (Sit	15) 🚺						Previous Next

The following information is needed based on the type of action the Taxpayer takes:

Update Reason	Information Needed	Mandatory Information
	Date Business Closed	Yes
Business Closed	Lease Terminated?	Yes
	Lease Termination Date	Conditional – required if <i>Lease</i> <i>Terminated?</i> is Yes
	Property ID	Yes
Report Duplicate	Doing Business As	Yes
Business/Multiple Notices Received	Location Address	Yes
	Other Information	No
	Date Business Moved	Yes
Moved - outside of	Lease Terminated?	Yes
San Francisco	Lease Termination Date	Conditional - required if <i>Lease</i> <i>Terminated?</i> is Yes
	Date Business Moved	Yes
Mound within Com	Did Doing Business As Change?	Yes
Moved - within San Francisco	New Doing Business As Name	Conditional - required if Did Doing Business As Change? is Yes
	Lease Terminated?	Yes

Update Reason	Information Needed	Mandatory Information
	Lease Termination Date	Conditional - required if <i>Lease</i> <i>Terminated?</i> is Yes
	New Business Location Address (Situs)	Yes
Other Information	Subject	Yes
Other mormation	Description	No
	Date Business Sold	Yes
	New Owner/Entity	No
	Lease Terminated?	Yes
Sold	Lease Termination Date	Conditional - required if <i>Lease</i> <i>Terminated?</i> is Yes
	New Owner Contact Name	No
	New Owner Mailing Address	No
	New Owner Phone	No
	New Owner E-mail	No

6. The Taxpayer can upload a file if necessary and click the *Next* button to submit the request.

Property Record Type Business Personal Property Type Account Name Entity Id Doing Business As Property ID File Property Statements File Exemptions Details & Related Request Property Updates Attach Proof/Bill of Sale Upload Files Or drop files 	
Business Personal Property File Property Statements File Exemptions Details & Related Request Property Updates Report Moved, Sold, Closed, Duplicate Business Attach Proof/Bill of Sale Upload Files Ordrop files	
Report Moved, Sold, Closed, Duplicate Business Attach Proof/Bill of Sale	
Attach Proot/Bill of Sale	
	Previous

7. The Taxpayer receives a message with the *Case* number upon submission. The user clicks the *Finish* button to close the message.

Property						
Record Type Business Personal Property	Туре	Account Name	Entity Id	Doing Business As	Property ID	
File Property Statements	File Exemptions	Details & Related	Request Property Upd	lates		

Requesting Vessel Updates

This section details the process of how a Taxpayer can create a Customer Service Case in the Community Portal to report updates to information on their vessel property.

1. The Taxpayer selects the vessel property from the list of *My Properties* by clicking the vessel Property Name.

ome My Details 🗸 Additional Reso	ırces ∨	
Properties My Properties		
9 items • Sorted by Property Name • Filtered by All properties - Type, R	cord Type • Updated a few seconds ago	
Property Name ↓	✓ Status	✓ Account Name
1	Active	
2	Active	
3	Active	

2. The Taxpayer clicks the *Request Vessel Updates* link to update the vessel information, provide associated information, and create a Customer Service Case.

Prope	erty					
Record Type Vessel	Ac	count Name	Entity Id	Vessel Name	Property ID	Habitual Location of Vessel Mission Creek
File Property	Statements	File Exemptions	Details & Relate	d Request Vess	el Updates	

3. The Taxpayer selects the reason for update and clicks the *Next* button to continue.

Record Type Business Personal Property	Туре	Account Name	Entity Id E	Doing Business As	Property ID
Property Statements	File Exemptions	Details & Related	Request Property Upda	ates	
	m the following li	ist			
Jpdate Reason Moved – outside of San Franc Moved – within San Francisco	isco	ist			
Please select a reason fro *Update Reason V Moved – outside of San Franc Moved – within San Francisco Business Closed Sold	isco	ist			Iready submitted a statement this year and would like to file your statement, please go to File

4. Taxpayer enters required information on the next screen, with fields displayed depending on the Update Reason selected on the prior screen. The Taxpayer can use the *Previous* button to change the Update Reason. All fields marked with a red asterisk (*) are required.

u have reported your Vessel Moved Outside of S	an Francisco:			
ase provide the following information				
Date Moved				
Sep 22, 2020				
Moved To				
Yacht Haven Marina, LA				
				Previous Next

The following information is needed based on t	the type of action the Taxpayer takes:
--	--

Update Reason	Information Needed	Mandatory Information
Vessel Moved – outside of San	Date Moved	Yes
Francisco	Moved To	Yes
	Date Moved	Yes
Vessel Moved – within San	Moved To	Yes
Francisco	Other Marina	Yes
	Slip Number	No
	Date Inoperable?	Yes
Vessel Inoperable	Reason Inoperable	Yes
	Attach Proof/Bill of Sale	Yes

Update Reason	Information Needed	Mandatory Information
Vessel Cold	Date Sold	Yes
Vessel Sold	Attach Proof/Bill of Sale	Yes
Other Information	Other Information	Yes
Report Duplicate	Property ID	Yes
Vessel/Multiple Notices	Vessel Name	Yes
Received	Location Address	Yes

5. The Taxpayer can upload a file if necessary and click the *Next* button to submit the request.

le Property Statements File	e Exemptions D	etails & Related	Request Vessel Updates		
You have reported your Vess	sel Moved Outside	e of San Francisco:			
Please provide the following inform	ation				
Attach Proof/Bill of Sale					
▲ Upload Files Or drop					
					Previous Next
					_

6. The Taxpayer receives a message with the new Customer Service Case number upon submission and clicks the *Finish* button to acknowledge the message.

Property Statements	File Exemptions	Details & Related	Request Vessel Updates	
	We've re	eceived your request,	Case# 00001100. You can find your request in Customer Service Cases under 'My Details' tab. We'll review your request and proceed as needed. Thank you!	
				Finish

Requesting Prepopulated Hard Copy Statement

The Taxpayer can request a prepopulated hard copy of their statement via the Community Portal.

- 1. The Taxpayer can navigate to the Property for which they would like to request the prepopulated hard copy statement by either clicking the *Properties* tab on the Home page or by clicking the *My Details* link in the global menu bar and then *Properties*.
- 2. The Taxpayer can click the *Property Name* from the list of the properties.

e My Details 🗸 Addition	al Resources 🗸	
Properties My Properties		
ems • Sorted by Property Name • Filtered by All properti	s - Type, Record Type • Updated a few seconds ago	
Property Name ↓	✓ Status	✓ Account Name
	Active	
	Active	
	Active	
		,

3. The Taxpayer navigates to the *File Property Statements* tab and clicks the *Request Hard copy* button.

Property Record Type Business Personal I Property State	Type Property	Account Name	Entity Id				
Business Personal I		Account Name	Entity Id				
Property State				Doing Business As	Property ID		
	File Exemptions	Details & Related	Request Property	Updates			
an Francisco As	ssessor Recorder		Welcor	ne to your Propert	vrecord		
				n your records, you are exped			
				71-L and BOE			
			File Online				
			Request Ha	ardcopy			
							Next

le Property Statements File Exemptions Details & Related	Request Property Updates	
San Francisco Assessor Recorder		
	Welcome to your Property record.	
	Based on your records, you are expected to file: BOE-571-L and BOE-571-LA	
	File Online	
	Request Hardcopy.	
		Next

4. The Taxpayer clicks the *Next* button to create a Customer Service case.

F	ile Property Statements File Exemptions Details & Related Request Property Updates	ii.				
	You've Selected to Request a Hardcopy	H				
	The Hardcopy will either be sent to the Account's Mailing Address or the Contact Email for this property based on the preference you have selected on your user profile – you currently have Email selected", if this is not your preferred method, please update your profile.	I				
	* Hardcopies that are sent via Email will take an upwards of 48 hours to be received. Hardcopies that are sent via Mail will take about 10 business day to arrive.					
	Select next when you are ready to submit your request.	I.				
	Previous Next					
		e				

5. Upon completion, the Taxpayer is routed to the *Case* details, which displays that the request has been made.

Case 00001107			
Property	Status New		
Details Files			
Туре	Request Hardcopy Form	Form Type	BOE-571-L & BOE-571-LA - Financial Institution or Insurance Company

Creating a New Customer Case

This section details the process of how a Taxpayer can create a Customer Service Case for a replacement notice, to add a new business location, to add a new vessel or to make other requests via the Community Portal.

1. The Taxpayer can navigate to the *General Inquiry* menu item listed under *Additional Resources* in the menu bar.

	General Inquiry	
Welc	CCSF Assessor-Rec	nd County of San Francisco Assessor-Recorder's new web portal
	CCJF ASSESSUI-REC	ortal, you can electronically file your Statements and Exemptions Forms, review and manage
		iness Accounts and Property Locations, as well as create customer support cases.

- 2. The Taxpayer selects the *Type* of the request by choosing from the following options:
 - **Request Replacement Notice** to request a Replacement notice for an Account/Business
 - Request New Business to add a new business
 - Request New Vessel to add a new vessel
 - Other for any other inquiry

Contact Customer Support Tell us how we can help.	
Туре	
Request Replacement Notice	•
✓ Request Replacement Notice	
Request New Business	
Request New Vessel	
Other	

The following information is needed based on the *Type* chosen:

Туре	Information Needed	Mandatory Information
Doquest Deplesement Notice	Account Name	Yes
Request Replacement Notice	Doing Business As	Yes
Request New Business	Business Owner	Yes

Туре	Information Needed	Mandatory Information
	Doing Business As	Yes
	Business Location Start Date	Yes
	New Business Location Address	Yes
	Owner	Yes
	Vessel Name	Yes
	Vessel ID Type	Yes
Request New Vessel	Vessel ID	Yes
	Location of Vessel	Yes
	Fish & Game Boat Number	No
	Date Vessel Moved into San Francisco	Yes
Other	N/A	

3. The Taxpayer provides the required information marked with a red asterisk (*) based on the fields in the previous table.

Type Request Replacem	ent Notice 🔹
Jpload File ↑ Upload Files	Or drop files
ïle Name:	
Note	Replacement Notice will be sent to the address in our records.
	: Replacement Notice will be sent to the address in our records.
Note Account Name	: Replacement Notice will be sent to the address in our records.
	: Replacement Notice will be sent to the address in our records.

4. The Taxpayer clicks the *Submit* button, and new Customer Service Case is created.

s page is used for general inquires. For example, if you need a replacement notice, to add a new business location, to add a new vessel, or to make a general inquered to update a specific property (for example, it has moved, closed, or sold) or report it as a duplicate, please go to My Details, Properties, select the specific propravigate to the 'Request Property Updates' tab. This will help us expedite your request.	My Details 🗸	Additional Resources 🗸
navigate to the 'Request Property Updates' tab. This will help us expedite your request.	is page is used for genera	inquires. For example, if you need a replacement notice, to add a new business location, to add a new vessel, or to make a general inquire
Type Request Replacement Notice Upload File Upload File Or drop files File Name: Note: Replacement Notice will be sent to the address in our records. Account Name	ed to update a specific pr	
Request Replacement Notice Upload File ① Upload Files File Name: Note: Replacement Notice will be sent to the address in our records. *Account Name		
Upload File Upload File Upload File Or drop files File Name: Note: Replacement Notice will be sent to the address in our records. *Account Name		
Note: Replacement Notice will be sent to the address in our records. * Account Name		
* Account Name		File Name:
		Note: Replacement Notice will be sent to the address in our records.
Deire Parises Ar		* Account Name
Liong business As		* Doing Business As
		Submit

Viewing and Tracking Existing Customer Case

This section details the process of how a Taxpayer can view all existing Customer Service Cases, view specific Case information, and upload a file/document to a Case in the community.

Viewing All Customer Service Cases

1. The Taxpayer can navigate to *My Details* menu and click the *Customer Service Cases* menu item.

	Business/Accounts		
N	Properties	City and County of San Francisco Assessor-Recorder's new web portal v web portal, you can electronically file your Statements and Exemptions Forms, review and manage	
	Filings/Statements	our Business Accounts and Property Locations, as well as create customer support cases.	
	Assessments		
Getting S To get started this year. Or	Customer Service C	our Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed Service Cases and Properties below. You may also link multiple Accounts and Properties.	
	Replacement PIN	SELVICE CASES	
To request a r	eplacement Entity ID and Ac	cess PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and	

2. The Taxpayer can view all existing *Customer Service Cases*.

	Cases							
U My Customer Service Cases 50+ items • Sorted by Case Number • Filtered by All cases - Case Record Type • Updated a minute ago								
	Case Number \downarrow 🛛 🗸	St	tatus 🗸	Property ~	Туре	\sim	Sub-Type	~
1	00001109	N	lew		Request Hardcopy Form			
2	00001108	N	lew		Request Hardcopy Form			
3	00001107	N	lew		Request Hardcopy Form			

3. The Taxpayer can click a specific *Case Number* to see additional information regarding the *Case*.

	Cases						
My Customer Service Cases 50+ items • Sorted by Case Number • Filtered by All cases - Case Record Type • Updated a minute ago							
	Case Number ↓	\sim	Status	\sim	Property	/ Туре 🗸	Sub-Type
1	00001109		New			Request Hardcopy Form	
2	00001108		New			Request Hardcopy Form	
3	00001107		New			Request Hardcopy Form	

4. The Taxpayer can navigate to the *Details* tab to view the Customer Service Case information.

Case 00001108			
Property	Status New		
Details Files			
Туре	Request Hardcopy Form	Form Type	BOE-571-L& BOE-571-LA - Financial Institution or Insurance Company

Uploading a File/Document to a Case

The Taxpayer can upload a file/document related to a case.

1. The Taxpayer can navigate to a specific *Case* and click the *Files* tab.

lome	My Details 🗸	Additional Resources 🗸	
Case 00	° 001109		
Property		Status New	
Details	Files		

2. The Taxpayer can click the *Upload Files* or *Add Files* button to upload a document/file.

Files (0)		Add Files
	▲ Upload Files	
	Or drop files	

3. The Taxpayer can pick a file from their computer and attach to the *Case*. Once the file is uploaded, the user clicks the *Done* button.

	Upload Files	
Test.docx 11 KB		o
f 1 file uploaded		Done

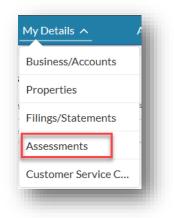
4. The Taxpayer can view the file that was uploaded.

Details Files	Add Files
Test Doc Sep 23,2020 • 11KB • docx	
	View All

Waiving Noticing Period for Assessments

The Taxpayer can request to have the Notice Period waived using the Community Portal.

1. The Taxpayer can navigate to *My Details* menu and click the *Assessments* menu item.



2. The Taxpayer clicks an assessment *Case Number* for which the noticing period needs to be waived.

tem	• Sorted by Case Number •	Filtered by	y All cases - 4 more filters applied •	Updated a few seconds ago		C
	Case Number 1	~	Assessment Year 🗸 🗸	Property 🗸	Sub-Status	```
	00578031		2019		Completed	
	00578043		2020		Completed	
	00607724		2020		Completed	
	02236832		2020		Completed	
	02236833		2020		Noticing	

3. The Taxpayer clicks the *Waive Notice Period* tab.

Case BPP Assessment				- 1
Property	Type Escape	Assessment Year 2020	Total Assessed Value \$90,000	
Details Files Waive Notice Period	_			

4. The Taxpayer reviews the waiver rights details, signs the waiver form by entering *Name* and clicks the *Confirm* button.

Property	Type Escape	Assessment Year 2020	Total Assessed Value \$90,000
Details Files Waive Notice Period			
	ESCAP	E WAIVER FORM	
ailed or otherwise delivered to the affected taxpayer a "Notice of			
waive all my rights and privileges under Section 531.8 of the Calif, nailed or otherwise delivered to the affected taxpayer a "Notice of mmediately.			

5. The SMART system displays a Success message.

Case BPPAssessment Success This has been submitted successfully					
Property	Type Escape	Assessment Year 2020	Total Assessed Value \$90,000		
Details Files Waive Notice Period					
	ESCAPI	E WAIVER FORM			
waive all my rights and privileges under Section 531.8 of the Califo mailed or otherwise delivered to the affected taxpayer a "Notice of I immediately.					
Name					