

**Monterey County Board of Supervisors
Referral Submittal Form**

Referral No. 2023.02
Assignment Date: 02/07/23
(Completed by CAO's Office)

SUBMITTAL - Completed by referring Board office and returned to CAO no later than noon on Thursday prior to Board meeting:

Date: 1/27/2023	Submitted By: LUIS ALEJO	District #: 1
Referral Title: EASY SMART PAY FOR PROPERTY TAX MONTHLY INSTALLMENTS PAYMENTS		
Referral Purpose: To implement the Easy Smart Pay Program to provide Monterey County residents and businesses the option of making monthly installments on their property tax payments.		
Brief Referral Description (attach additional sheet as required): Many property owners have the option to pay their property taxes in monthly installment through escrow accounts with banks owning mortgages on their property. However, property owners who own their property outright, or do not have escrow accounts, do not have the option to pay their property taxes to the county in monthly installments. For some, the biannual tax bill creates financial hardship or considerable inconvenience. The County Tax Collector lacks authority to bill property owners in monthly installments.		
Easy Smart Pay provides this service to county taxpayers on a voluntary basis. The program is overseen by the California State Association of Counties Finance Corporation. To implement this program in Monterey County, the Board of Supervisors must approve a resolution granting its implementation. Once implemented, it would need to be promoted and advertised. This program would provide a much-needed service to thousands of our county home and business owners and taxpayers.		
Classification - Implication		Mode of Response
<input type="checkbox"/> Ministerial / Minor	<input type="checkbox"/> Land Use Policy	<input type="checkbox"/> Memo <input checked="" type="checkbox"/> Board Report <input checked="" type="checkbox"/> Presentation
<input type="checkbox"/> Social Policy	<input checked="" type="checkbox"/> Budget Policy	Requested Response Timeline
<input checked="" type="checkbox"/> Other: Tax Collector Services		<input type="checkbox"/> 2 weeks <input checked="" type="checkbox"/> 1 month <input type="checkbox"/> 6 weeks
		<input type="checkbox"/> Status reports until completed
		<input type="checkbox"/> Other: _____ <input type="checkbox"/> Specific Date: _____

ASSIGNMENT – Provided by CAO at Board Meeting. Copied to Board Offices and Department Head(s) Completed by CAO's Office :

Department(s): Treasurer-Tax Collector	Referral Lead: Mary Zeeb	Board Date: 2/7/23
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REASSIGNMENT – Provided by CAO. Copied to Board Offices and Department Head(s). Completed by CAO's Office:

Department(s):	Referral Lead:	Date:
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ANALYSIS - Completed by Department and copied to Board Offices and CAO:

Department analysis of resources required/impact on existing department priorities to complete referral:	
Analysis Completed By:	Department's Recommended Response Timeline
_____	<input type="checkbox"/> By requested date
Date: _____	<input type="checkbox"/> 2 weeks <input type="checkbox"/> 1 month <input type="checkbox"/> 6 weeks <input type="checkbox"/> 6 months
	<input type="checkbox"/> 1 year <input type="checkbox"/> Other/ Specific Date: _____

REFERRAL RESPONSE/COMPLETION - Provided by Department to Board Offices and CAO:

Referral Response Date:	Board Item No.:	Referrals List Deletion:
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Note: Please cc Claudia Escalante and Karina Bokanovich on all CAO correspondence relating to referrals.