



**Office of the Assessor-Recorder**

Taxpayer Help Pages

# Table of Contents

<b>COMMUNITY PORTAL</b> .....	<b>4</b>
WHAT IS COMMUNITY PORTAL? .....	4
FIRST TIME USER SET UP .....	4
<i>Sign up</i> .....	4
<i>Log in using Facebook</i> .....	6
<i>Log in using Google</i> .....	8
RETURNING USER LOGIN AND PASSWORD RESET.....	10
<i>Returning User Login</i> .....	10
<i>Password Reset</i> .....	11
NAVIGATING COMMUNITY PORTAL HOME PAGE .....	14
FILING BUSINESS PERSONAL PROPERTY STATEMENT.....	17
<i>Filing Statements</i> .....	17
<i>Filing Form BOE-571-L Statement</i> .....	20
List of Business Type and SubType .....	22
<i>Filing Form BOE-571-R for Business Apartment Property</i> .....	35
<i>Filing Form BOE-571-STR for Short Term Rental Property</i> .....	44
<i>Filing Form BOE-571-L Biopharma for Biopharmaceutical Company</i> .....	47
<i>Filing Form BOE-571-L Leasing for Leasing Company</i> .....	50
<i>Filing Form BOE-571-L Billboard for Billboard Company</i> .....	53
<i>Filing Form BOE-571-L and BOE-571-LA for Financial/Insurance Company</i> .....	55
FILING A VESSEL PROPERTY STATEMENT (INCLUDES 50 TON VESSEL EXEMPTION).....	70
FILING A VESSEL EXEMPTION (4% AFFIDAVIT) .....	80
AMENDING A FILED STATEMENT.....	88
FILING AN INSTITUTIONAL EXEMPTION.....	91
GENERATING A VALUATION REPORT .....	103
CLAIMING ACCOUNTS AND PROPERTIES .....	105
UPDATING ACCOUNT INFORMATION .....	109
REQUESTING PROPERTY UPDATES .....	114
REQUESTING VESSEL UPDATES.....	119
REQUESTING PREPOPULATED HARD COPY STATEMENT .....	121
CREATING A NEW CUSTOMER CASE .....	124
VIEWING AND TRACKING EXISTING CUSTOMER CASE.....	126
<i>Viewing All Customer Service Cases</i> .....	126

*Uploading a File/Document to a Case* .....127  
*Waiving Noticing Period for Assessments*.....128

# 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:

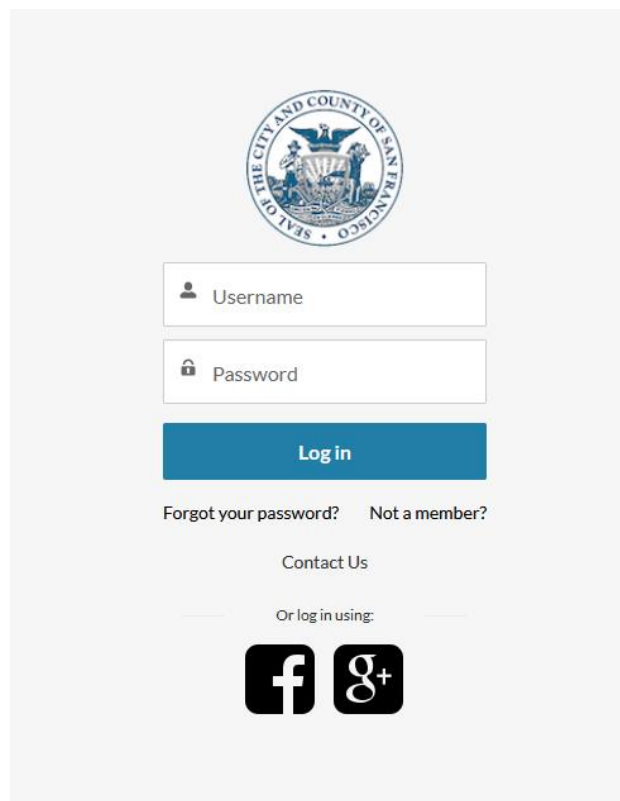
- E-file annual statements for BPP, Exemptions, and Marine (no need to mail forms)
- Submit customer service requests and view original submissions
- Access all properties under one account
- Update their account information, manage mailing addresses, view statements and past assessments

## First Time User Set Up

A Taxpayer navigates to <https://online.sfassessor.org>. 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

1. 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.



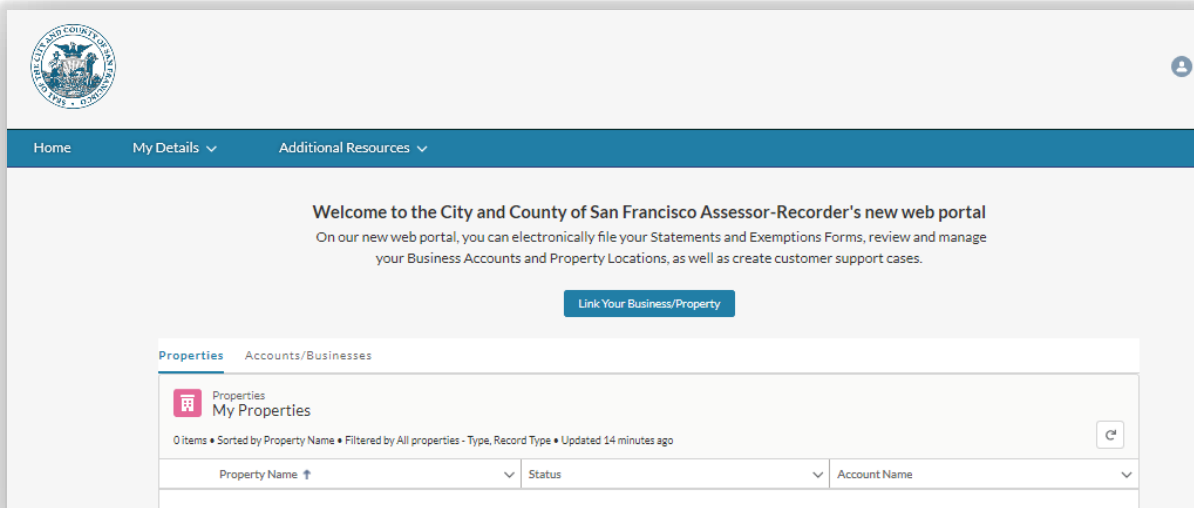
The screenshot shows the login interface for the Community Portal. At the top center is the official seal of the City and County of San Francisco. Below the seal are two input fields: one for 'Username' with a person icon and one for 'Password' with a lock icon. A prominent blue button labeled 'Log in' is positioned below the password field. Underneath the 'Log in' button are two links: 'Forgot your password?' and 'Not a member?'. Below these links is a 'Contact Us' link. At the bottom, there is a heading 'Or log in using:' followed by two social media icons: Facebook and Google+.



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

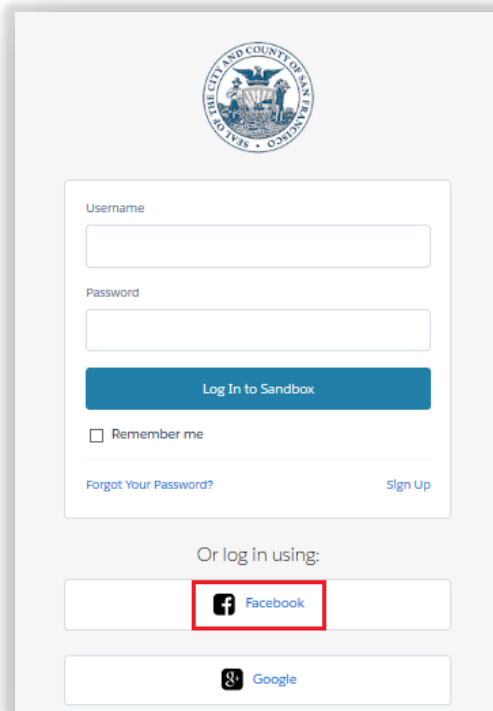
A screenshot of a web form for signing up. At the top center is the seal of the City and County of San Francisco. Below it are several input fields: "First Name" with the value "John", "Last Name" with the value "Smith", "Username" with the value "johnsmith@abc.com", "Email" with the value "johnsmith@abc.com", "Password" with seven dots, and "Confirm Password" with seven dots. At the bottom is a blue button with the text "Sign Up", which is highlighted with a red dashed border.

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

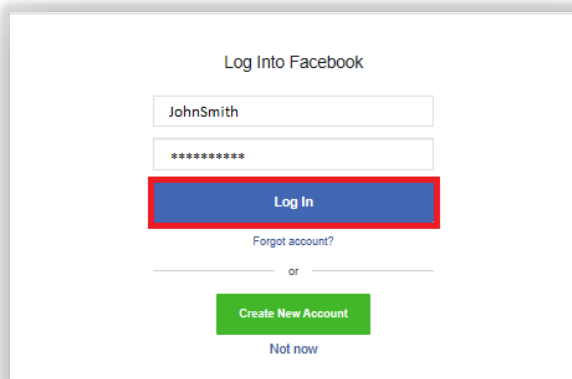


## Log in using Facebook

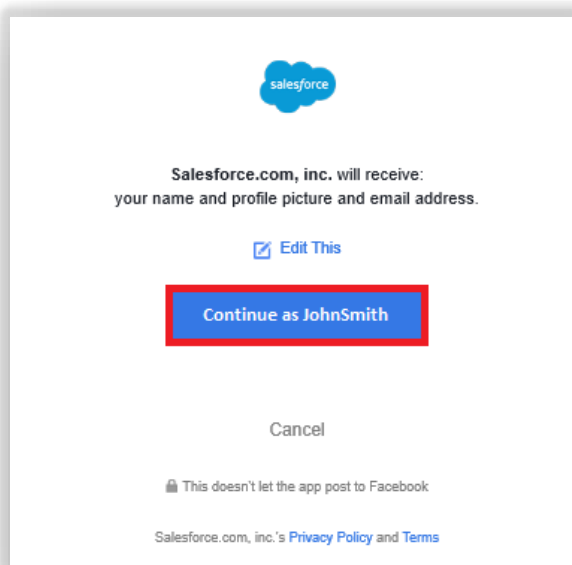
1. The Taxpayer can log in using Facebook by clicking the **Facebook** button.



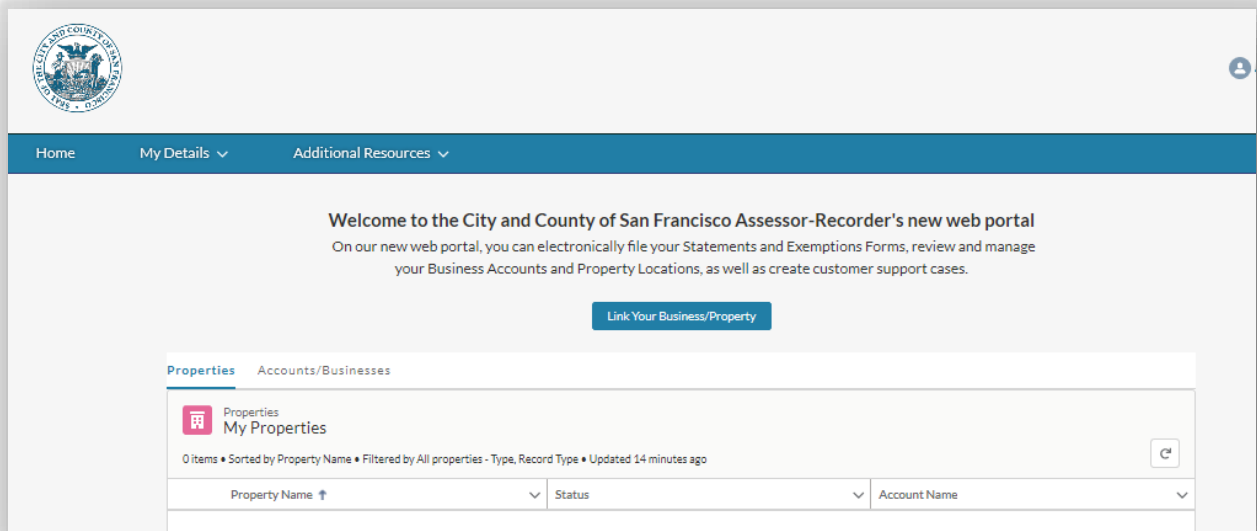
2. The Taxpayer enters **Email or Phone Number** and **Password**, then clicks the **Log In** button.



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

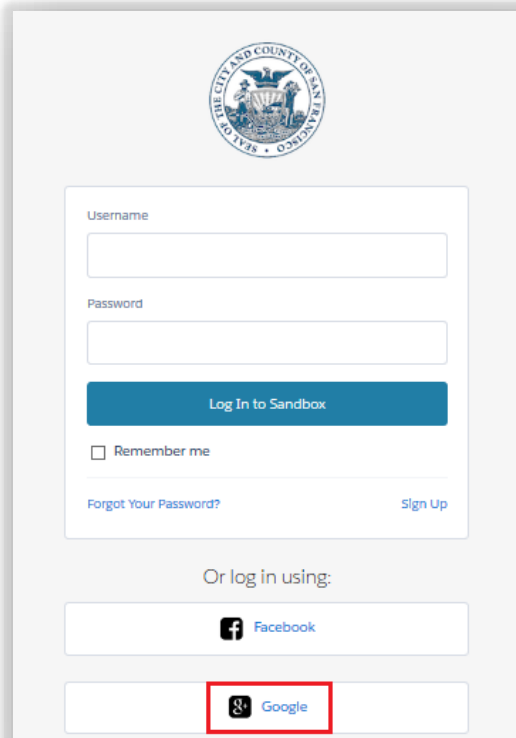


4. After successful login, the Taxpayer is navigated to the Community Portal Home page.



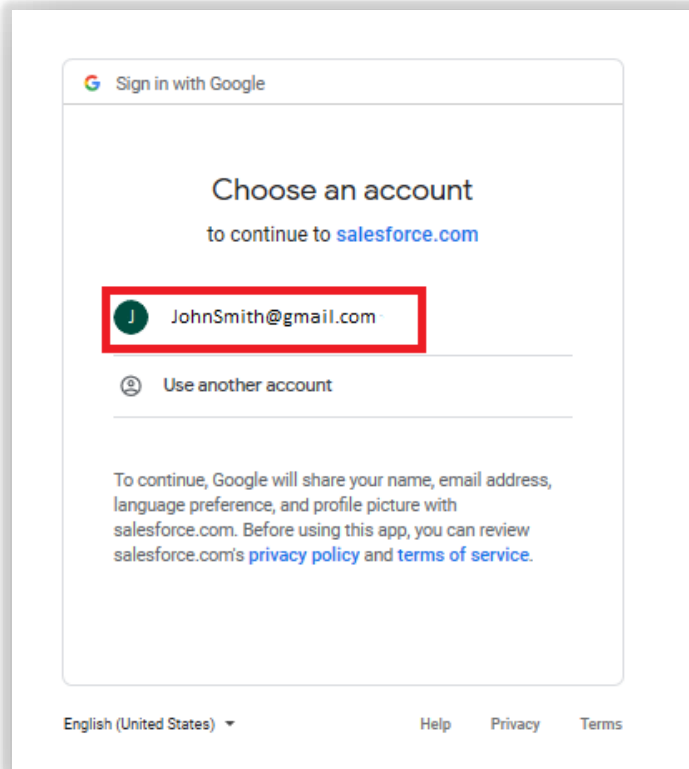
## Log in using Google

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

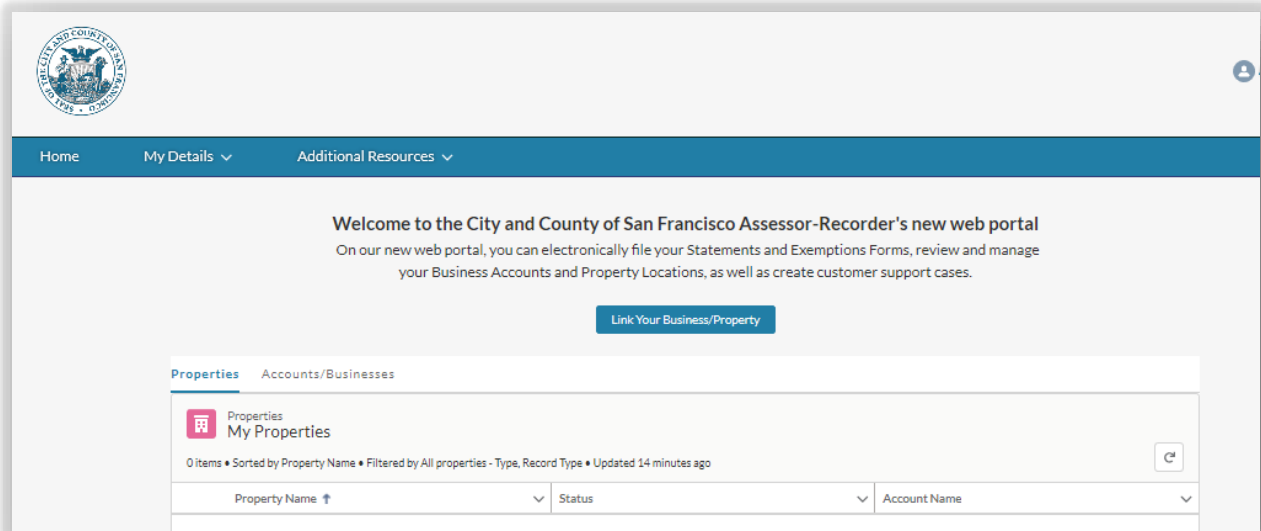


2. The Taxpayer selects their existing Google account.





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

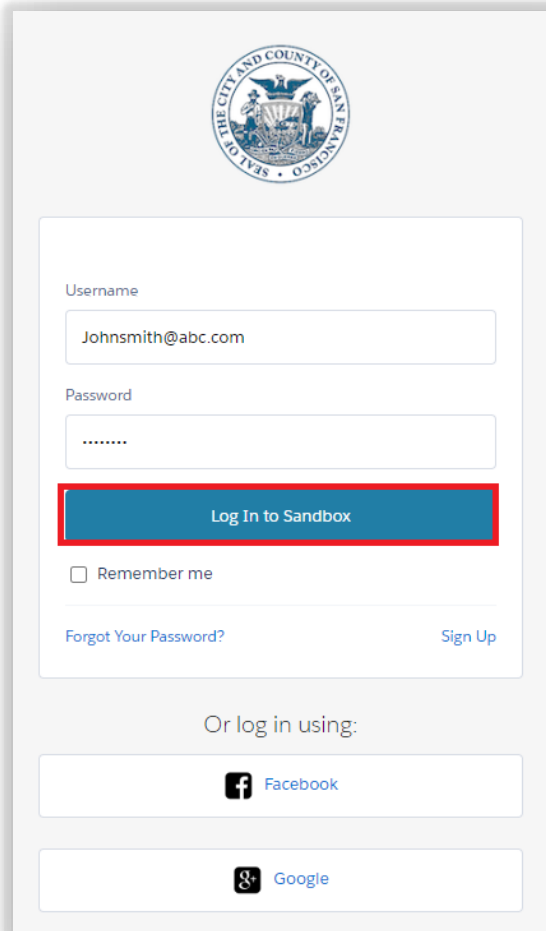


## Returning User Login and Password Reset

### Returning User Login

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

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



Seal of the City and County of San Francisco

Username  
Johnsmith@abc.com


Password  
.....


**Log In to Sandbox**

Remember me

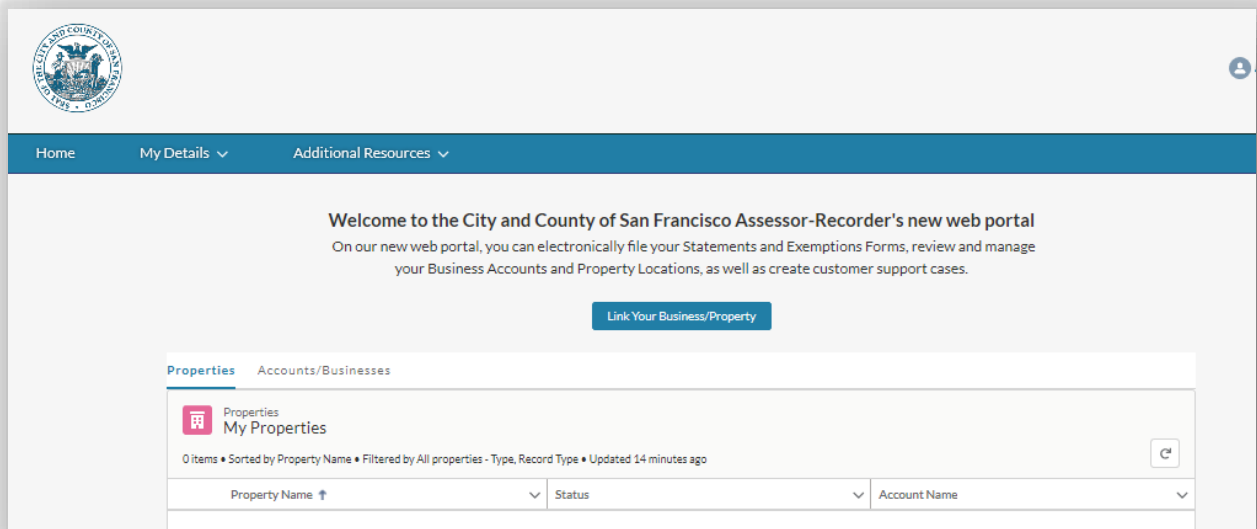
[Forgot Your Password?](#) [Sign Up](#)

Or log in using:

 Facebook

 Google

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



## Password Reset

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

SEAL OF THE CITY AND COUNTY OF SAN FRANCISCO

Username  
Johnsmith@abc.com

Password

Log In to Sandbox

Remember me

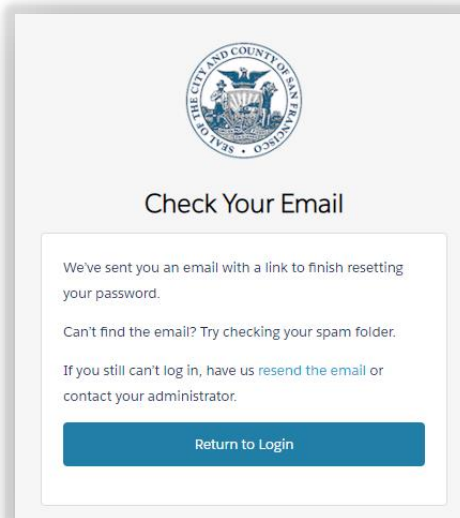
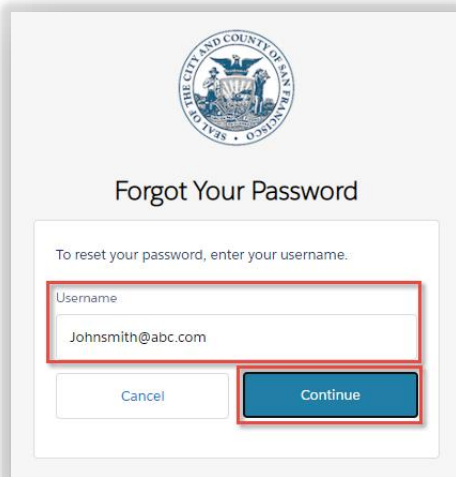
Forgot Your Password? Sign Up

Or log in using:

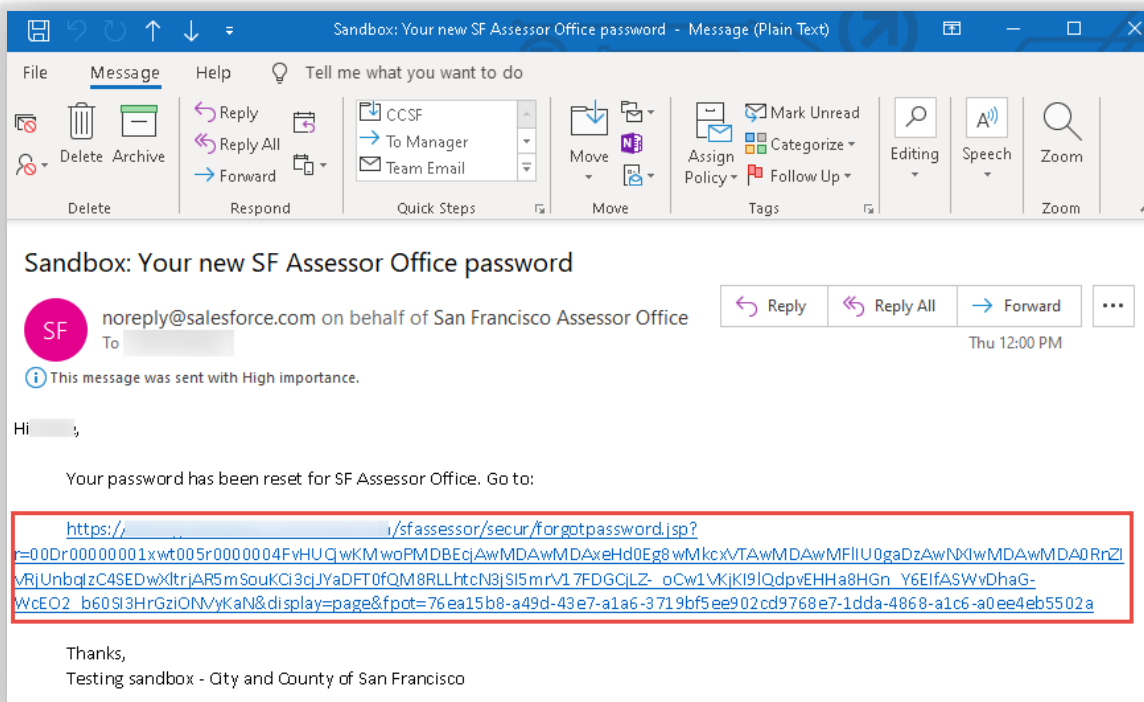
Facebook

Google

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

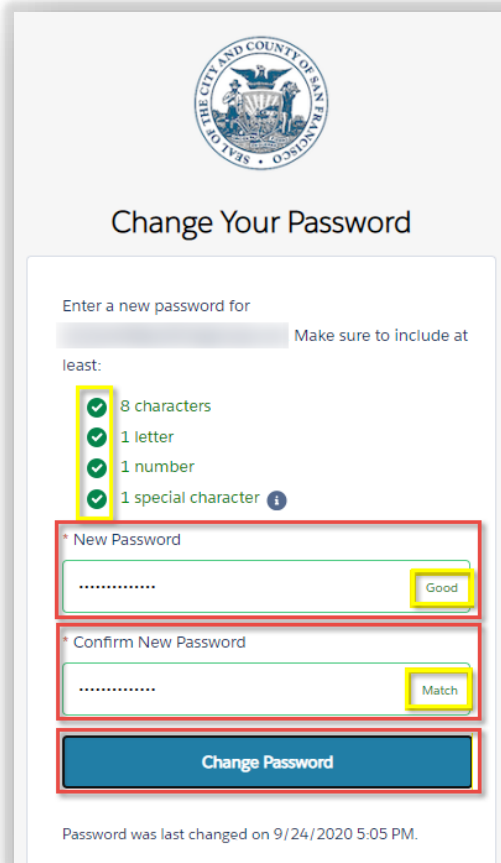


3. The Taxpayer locates the email in their inbox and clicks the link provided.



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.



SEAL OF THE CITY AND COUNTY OF SAN FRANCISCO

## Change Your Password

Enter a new password for  Make sure to include at least:

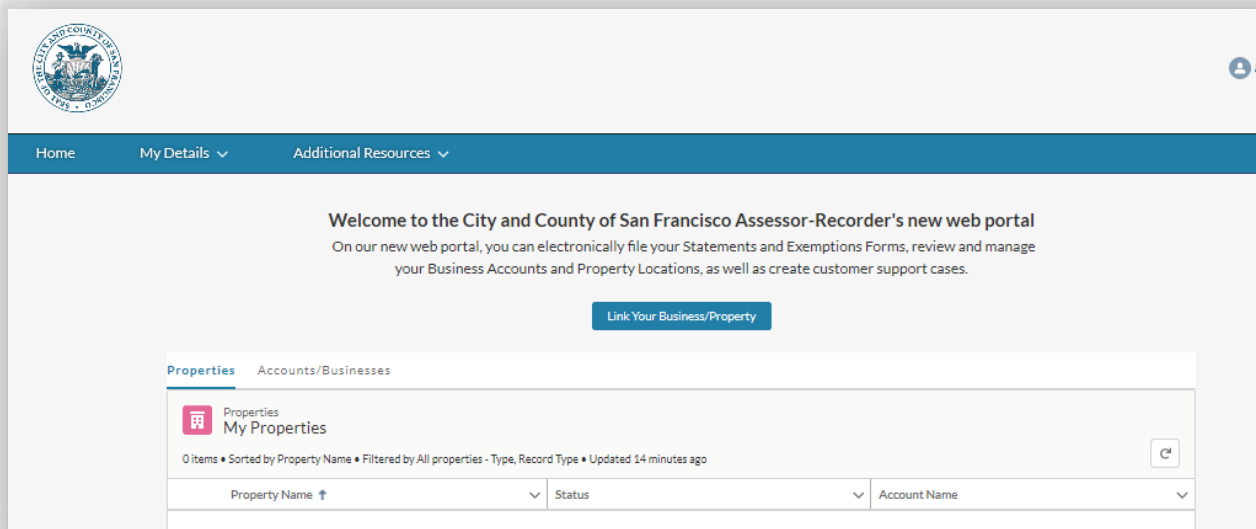
- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number
- ✓ 1 special character ⓘ

\* New Password  Good

\* Confirm New Password  Match

Password was last changed on 9/24/2020 5:05 PM.

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



## 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

Home My Details Additional Resources **Main navigation menu**

## 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.

**Getting Started in Community**  
To get started, click the button below 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 linked, you will be able to see all the associated Properties below. You may also link multiple Accounts and Properties.

**Request a Replacement PIN**  
To request a replacement Entity ID and 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 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 above. There you can also view your past filings, assessment history, and any customer service cases.

**Add Account/Property** **Click here to add new Accounts or Properties**

**Filing Statements and Viewing Property Details**  
To file BPP statements and/or exemptions 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 Accounts linked to view information and request updates.

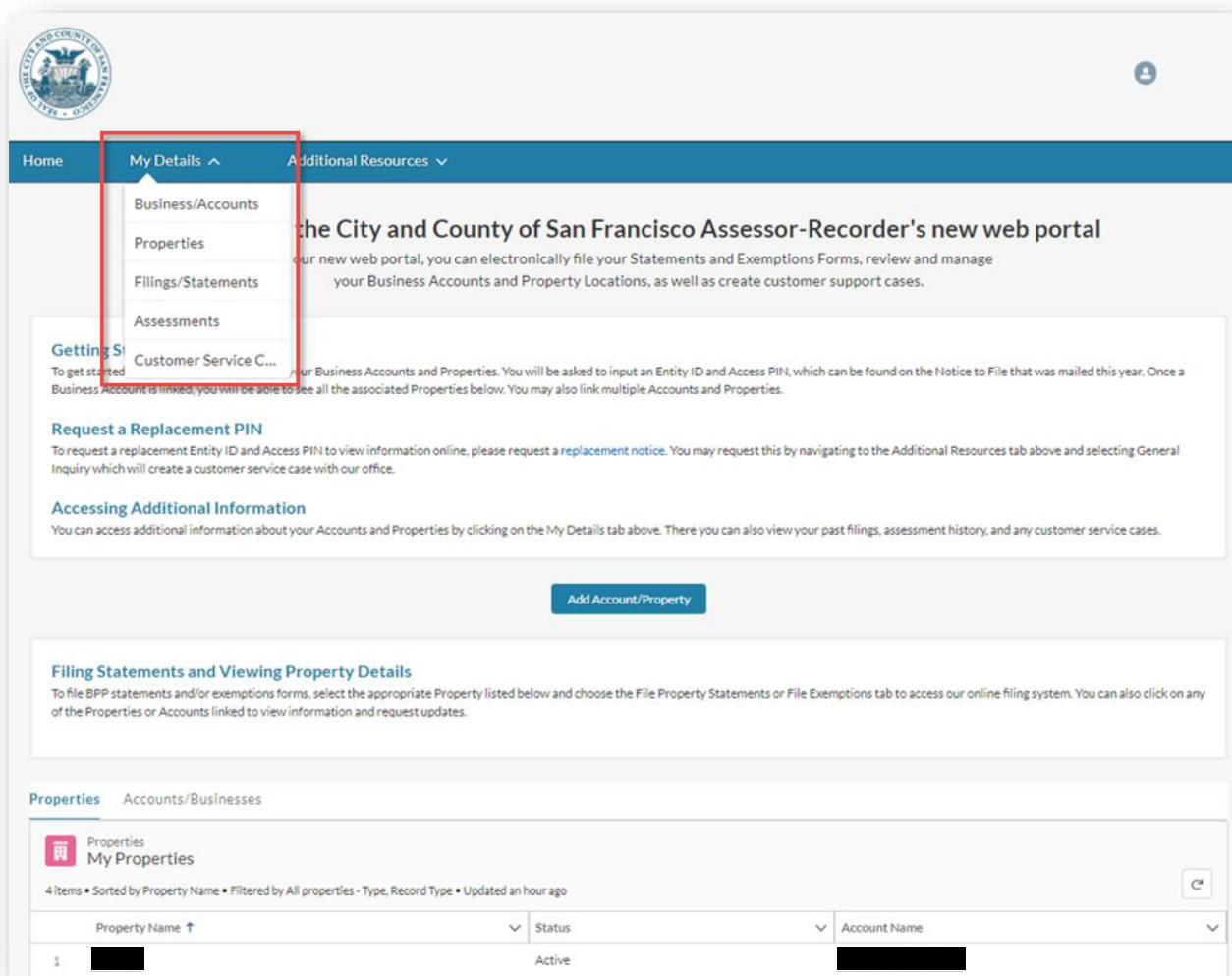
**Properties** Accounts/Businesses **Tabs displaying the user's existing Properties and Accounts/Businesses**

Properties  
My Properties  
4 items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated a minute ago

Property Name ↑	Status	Account Name
1 [REDACTED]	Active	[REDACTED]

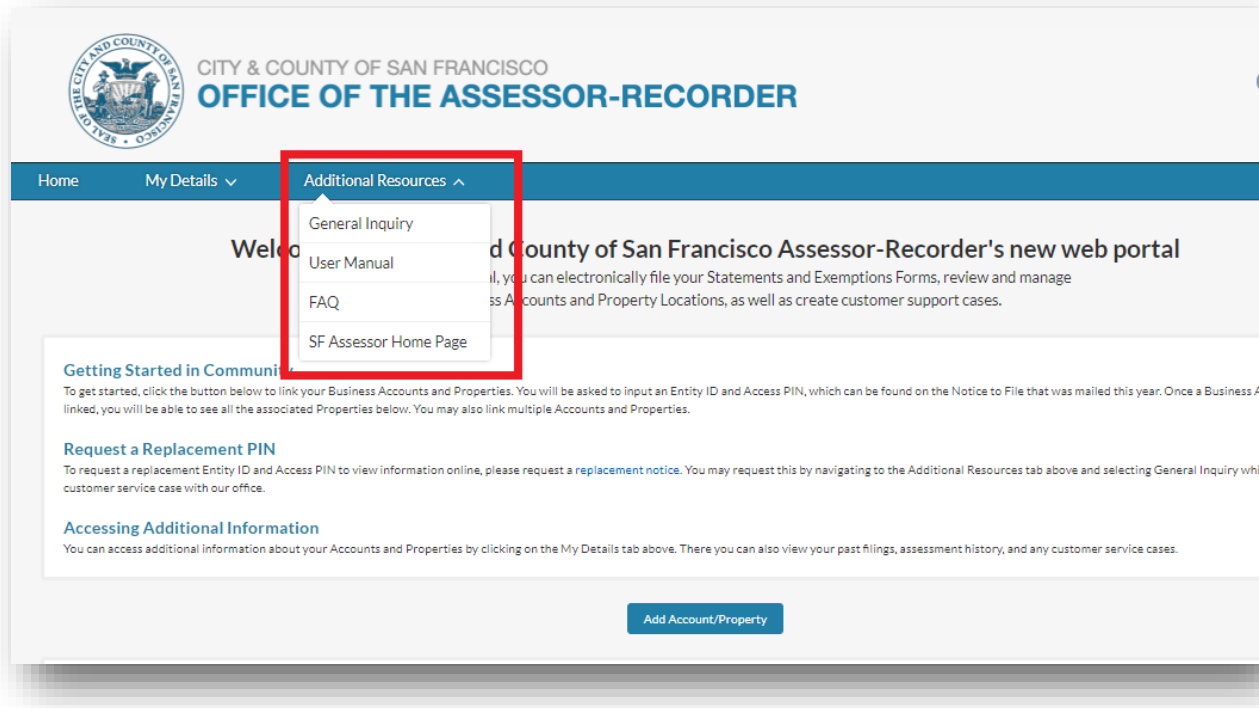
The menu **My Details** displays menu items that allow the Taxpayer to access the following:

- **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



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





- **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 [City & County of San Francisco Office of the Assessor-Recorder](#).

## 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

1. 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**.

Home My Details ^ Additional Resources v

Business/Accounts  
**Properties**  
 Filings/Statements  
 Assessments  
 Customer Service C...

## City and County of San Francisco Assessor-Recorder's new web portal

By using 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 Started**  
 To get started with our new web portal, you will need 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 linked, you will be able to see all the associated Properties below. You may also link multiple Accounts and Properties.

**Request a Replacement PIN**  
 To request a replacement Entity ID and 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 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 above. There you can also view your past filings, assessment history, and any customer service cases.

[Add Account/Property](#)

**Filing Statements and Viewing Property Details**  
 To file BPP statements and/or exemptions 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 Accounts linked to view information and request updates.

**Properties** Accounts/Businesses

Properties  
**My Properties**

3 Items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated a minute ago

	Property Name ↑	Status	Account Name
1	[REDACTED]	Active	[REDACTED]
2	[REDACTED]	Active	[REDACTED]
3	[REDACTED]	Active	[REDACTED]

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

File Property Statements File Exemptions Details & Related Request Property Updates

San Francisco Assessor Recorder

Welcome to your Property record.

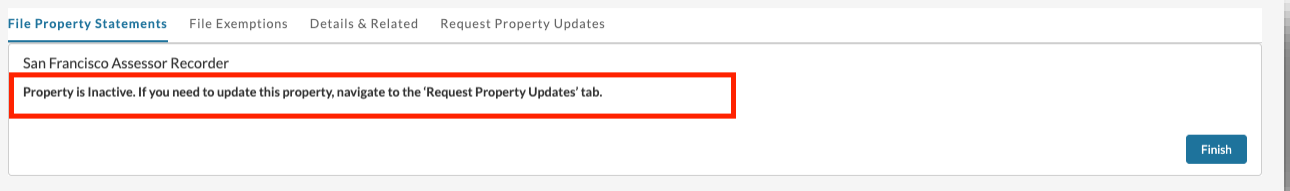
Based on your records, you are expected to file:

**BOE-571-L**

File Online

Request Hardcopy

- The Taxpayer cannot submit statements for inactive property.



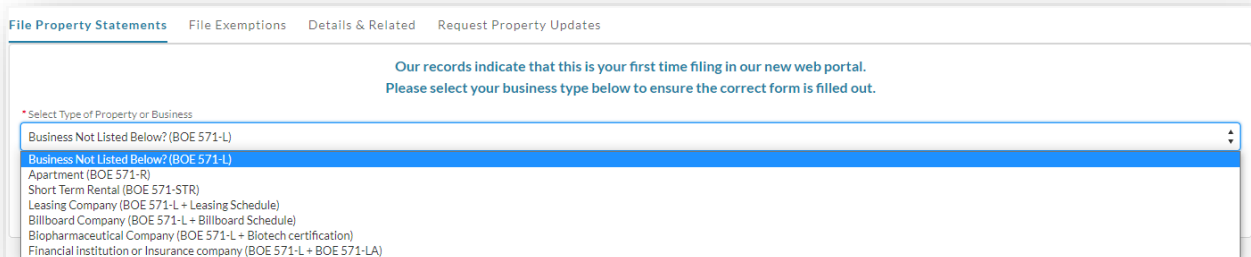
- The Taxpayer cannot submit statements past the yearly cut-off date. The Taxpayer can continue to submit generic Customer Service requests, and update their information.



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



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.

1. 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.

The screenshot shows a web interface for a property record. At the top, there is a header with a 'Property' icon and a redacted name. Below this is a navigation bar with several tabs: 'File Property Statements' (highlighted with a red box), 'File Exemptions', 'Details & Related', and 'Request Property Updates'. The main content area is titled 'San Francisco Assessor Recorder' and 'Welcome to your Property record.' It states 'Based on your records, you are expected to file: BOE-571-L'. There are two buttons: 'File Online' (highlighted with a red box) and 'Request Hardcopy'. A 'Next' button is located in the bottom right corner.

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.

### 571-L: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$0	2. Equipment \$0	3. Leased Equipment \$0	4. Construction In Progress \$0	5. Leasehold Improvements \$0	6. Alternate Schedule A \$0	<b>Total Reported Cost</b> \$0
--------------------	---------------------	----------------------------	------------------------------------	----------------------------------	--------------------------------	-----------------------------------

My Property Location | Part I: General Info | Part II: Property Belonging to You | Part III: Property Belonging to Others | Submit

#### Provide your name and mailing address

Name [REDACTED] Mailing Address [REDACTED] Edit

#### Business Location

Property name [REDACTED] Roll Code [Unsecured]

Remarks [REDACTED]

Back Next Print PDF

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

- 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.

### 571-L: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$0	2. Equipment \$0	3. Leased Equipment \$0	4. Construction in Progress \$0	5. Leasehold Improvements \$0	6. Alternate Schedule A \$0	<b>Total Reported Cost</b> \$0
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My Property Location | **Part I: General Info** | Part II: Property Belonging to You | Part III: Property Belonging to Others | Submit

#### Part I: General Information

Complete (a) thru (g)

\* a. Select type of business [REDACTED]      \* Select subtype of business [REDACTED]

\* b. Enter local telephone number [REDACTED]      \* Email address [REDACTED]

Fax Number: [REDACTED]

\* c. Do you own the land at this business location? [REDACTED]

\* d. When did you start business at this location? [REDACTED]

\* e. Enter location of general ledger and all related accounting records (include zip code): [REDACTED] Edit

\* f. Name of authorized person to contact at location of accounting records [REDACTED]

\* Telephone number of authorized person to contact at location of accounting records [REDACTED]

g. During the period of January 1, 2020 through December 31, 2020

\* (1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity? [REDACTED]

Remarks [REDACTED]

Back | **Next** | Print PDF

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

Biotech	General
	Laboratory
Cleaning	Car Wash
	Dry Cleaning
	General
	Janitorial Service
	Laundry – Commercial/Clothes Cleaning Service
	Laundry – Self Operating/Coin Operated
Construction	Batch Plants (Concrete & Asphalt)
	Demolition Contractor
	General
	Sand/Dirt/Gravel – Retail/Wholesale Suppliers
Entertainment/ Media/ Communications	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)
	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
Food Services	Bakery
	Bottling Plants (Other Than Breweries)
	Breweries
	Food Processing
	General
	Grocery/Supermarket
	Warehousing
	Winery
Health	Biotech
	Convalescent Care
	Dental Lab
	Drug/Pharmaceutical Mfg
	General
	Health Clubs/Gyms
	Laboratory
	Medical/Dental
	Pharmacy And Drug Store
	Veterinary Hospital
Leasing	-None-
Lodging	Apartment
	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)



Manufacturing	Dental Lab
	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
Other Services	Banking/Financial Institution
	Cable
	Dry Cleaning
	Financial Services
	Floor Covering and Installation Services
	Gas/Service Station
	General
	Insurance Services
	Janitorial Services
	Laboratory
	Mortuaries
	Recyclers
Telephone & Communication	
Printing	Book Binding
	General
	Offset Lithographic Printing Press
	Photo Labs – Commercial
	Photo Labs – One Hour
	Post-Presses
	Pre-Presses

	Presses
Property Management	Building/Parking Management
	General
	Janitorial Service
Retail/Wholesale	General
	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: Business Personal Property Statement

Property: [REDACTED]

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 Property Location > Part I: General Info > **Part II: Property Belonging to You** > Part III: Property Belonging to Others > Submit

Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

Compare to Last Year's Assessed Costs

Cancel Save **New**

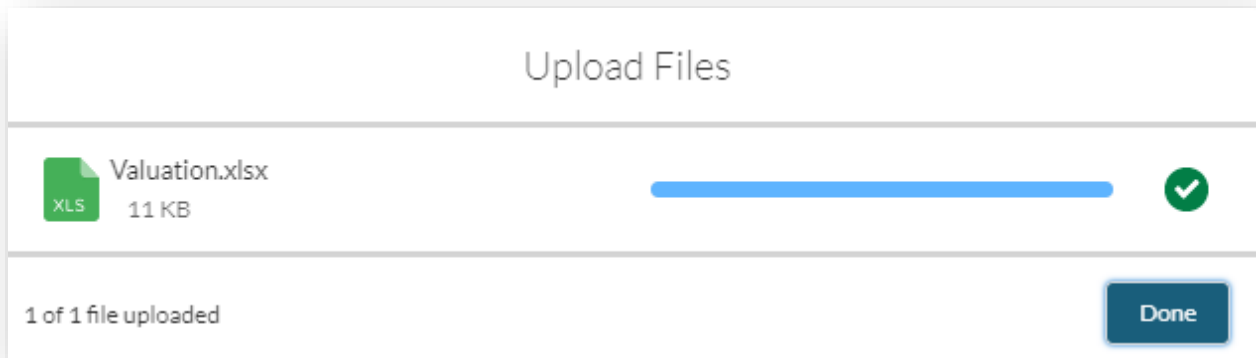
Add attachment

**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 additional 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
<p>Cancel Save <b>New</b></p> <p>Remarks</p> <p>[REDACTED]</p>					

Back Next **Print PDF**



- 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.

Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

Compare to Last Year's Assessed Costs

Cancel Save New

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 additional 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
Leasehold Improvements - Structure	2019	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr	\$13,180	\$13,180	
Machinery & Equipment	2019	Equipment	\$20,081	\$20,081	
Office Furniture & Equipment	2019	Equipment	\$5,000	\$5,000	
Supplies	2019	Supplies	\$500	\$500	

Cancel Save New

Remarks

Back Next Print PDF

- 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

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
Counterlines, Partitions, Cafeteria Equipment, etc.	2020	Alternate Schedule A		5000	Oven
Leasehold Improvements - Structure	2019	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr	\$13,180	\$13,180	
Machinery & Equipment	2019	Equipment	\$20,081	\$20,081	FOOD PROC
Office Furniture & Equipment	2019	Equipment	\$5,000	\$5,000	
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: Business Personal Property Statement

Property: [REDACTED]

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 Property Location    Part I: General Info    **Part II: Property Belonging to You**    Part III: Property Belonging to Others    Submit

### Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

#### Compare to Last Year's Assessed Costs

Cancel Save New

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 additional information if needed.

I certify that I have no individual Asset Classification Line Items by default

Asset Classification	Acquisition Year	Property Category	Last Reported Cost	This Year's Reported Cost	Description of This Year's Reported Cost
----------------------	------------------	-------------------	--------------------	---------------------------	--

Cancel Save **New**

Remarks

Back Next Print PDF

The Taxpayer must either enter an Asset or click the certification button that there are no assets to declare.

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.

## 571-L: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$500	2. Equipment \$25,081	3. Leased Equipment \$0	4. Construction in Progress \$0	5. Leasehold Improvements \$13,502	6. Alternate Schedule A \$123	<b>Total Reported Cost</b> \$39,206
----------------------	--------------------------	----------------------------	------------------------------------	---------------------------------------	----------------------------------	--

My Property Location > Part I: General Info > Part II: Property Belonging to You > **Part II - Schedule D** > Part III: Property Belonging to Ot... > Submit

### Part II - Schedule D

✓ You have reported a cost of \$13,181.00 in Leasehold Improvements - Structure with acquisition year 2019 for a Net change of \$1.00.

Please click here to provide more information of the Acquisitions or Disposals that caused this change.

**New**

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
------	----------------------------	---------------------------	------	-------------	--

✓ You have reported a cost of \$321.00 in Leasehold Improvements - Fixtures with acquisition year 2020 for a Net change of \$321.00.

Please click here to provide more information of the Acquisitions or Disposals that caused this change.

**New**

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
------	----------------------------	---------------------------	------	-------------	--

Remarks

[REDACTED]

Back Next Print PDF

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

\*Type: 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 Belonging to You** section.

My Property Location > Part I: General Info > **Part II: Property Belonging to You** > Part II - Schedule D > Part III: Property Belonging to Ot... > Submit

Part II - Schedule D

✓ You have reported a cost of \$10,000.00 in Leasehold Improvements - Structure with acquisition year 2020 for a Net change of \$10,000.00.

New

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
Addition	January	2020	\$10,000	Leasehold Improvements done	

✓ You have reported a cost of \$50,000.00 in Leasehold Improvements - Fixtures with acquisition year 2020 for a Net change of \$50,000.00.

New

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
Addition	March	2020	\$60,000	more additions	
Disposal	January	2020	\$10,000	Disposed few items	

Remarks

Back **Next** Print PDF

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-L: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$500	2. Equipment \$25,081	3. Leased Equipment \$0	4. Construction in Progress \$0	5. Leasehold Improvements \$13,180	6. Alternate Schedule A \$5,123	Total Reported Cost \$43,884
----------------------	--------------------------	----------------------------	------------------------------------	---------------------------------------	------------------------------------	---------------------------------

My Property Location    Part I: General Info    Part II: Property Belonging to You    Part III: Property Belonging to Others    Submit

### Part III: Declaration of Property Belonging to Others

If 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 or 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

Add attachment

Upload Files Or drop files

Lessor's Name	Tax Obligation	Leased Equipment Type	Year of Acq.	Cost to Purchase	Annual Rent	Description
---------------	----------------	-----------------------	--------------	------------------	-------------	-------------

Cancel Save New

The Taxpayer must add a Lessor's Name or click the certification button that there is no Lessor to declare.

I certify that I have no property to report that belongs to others

Remarks

[REDACTED]

Back Next Print PDF

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	[REDACTED]
Lessor's Mailing address	[REDACTED]
Tax Obligation	--None--
* Acquisition Year	2020
Manufacture Year	[REDACTED]
Description	[REDACTED]
Leased Number	[REDACTED]
* Cost	\$1,000.00
Annual Rent	[REDACTED]

Cancel Save



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

571-L: Business Personal Property Statement

Property: [REDACTED]

1. 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	<b>Total Reported Cost</b> \$44,884
----------------------	--------------------------	--------------------------------	------------------------------------	---------------------------------------	------------------------------------	--

My Property Location | Part I: General Info | **Part II: Property Belonging to You** | Part III: Property Belonging to Others | Submit

Part III: Declaration of Property Belonging to Others

If 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 or 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

Add attachment  
Upload Files Or drop files

Lessor's Name	Tax Obligation	Leased Equipment Type	Year of Acq.	Cost to Purchase	Annual Rent	Description
[REDACTED]			2020	\$1,000		

Cancel Save New

Remarks

Back **Next** Print PDF

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

## 571-L: Business Personal Property Statement

Property: [REDACTED]

1. 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	<b>Total Reported Cost</b> \$44,884
----------------------	--------------------------	--------------------------------	------------------------------------	---------------------------------------	------------------------------------	--

My Property Location

Part I: General Info

Part II: Property Belonging to You

Part III: Property Belonging to Others

Submit

### Sign & Submit

I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or 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 the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2021.

\* Signature of assessee or authorized agent

[REDACTED]

\* Date

[REDACTED]

\* Name of Assessee or Authorized Agent

[REDACTED]

\* Title of Assessee or Authorized Agent

[REDACTED]

\* Name of Legal Entity

[REDACTED]

Federal Employer ID Number

[REDACTED]

\* Preparer's Name and Address

[REDACTED]

\* Title of Preparer

[REDACTED]

\* Telephone Number

[REDACTED]

Business Description

--None--

Ownership Type

--None--

Remarks

THIS STATEMENT IS SUBJECT TO AUDIT

Back

Submit

Print PDF

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 Complete

Thank you for electronically filing. Listed below is your confirmation number.

Statement Type: BOE-571-L - Business Property Statement  
Property Id: [REDACTED]  
Confirmation Number: [REDACTED]  
Date of Submission: 11/19/2021 9:11 AM

You may view your e-Filed statement by clicking "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.



### 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.

1. 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.

Home My Details ▾ Additional Resources ▾

INSTRUCTIONS INFO/ADDRESSES PART II: QUESTIONS UNIT TOTALS SCHEDULES A AND B DECLARATION BY ASSESSEE

**BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT**  
INSTRUCTIONS

The Revenue and Taxation Code of the State of California requires that every person, upon request of the Assessor, shall file a written property statement under penalty of perjury with the Assessor within such time as the Assessor may appoint. Please complete this form according to the numbered instructions provided below as your statement of furnishings and related equipment owned, possessed or controlled by you as of 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 completed statement form to the Assessor on or before the date stated in the official requirement section.** In all instances, you must return the original BOE-571-R.

**LINE 3. PROPERTY TRANSFER**

**Real Property** – For purposes of reporting a change in control, real property includes land, structures, or fixtures owned or held under lease from (1) a private owner if the remaining term of the lease exceeds 35 years, including written renewal options, (2) a public owner (any arm or agency of local, state, or federal government) for any term or (3) mineral rights owned or held on lease for any term, whether in production or not.

**Controlling Interest** – When any person or legal entity obtains more than 50 percent of the voting stock of a corporation, or more than a 50 percent ownership interest in any other type of legal entity. The interest obtained includes what is acquired directly or indirectly by a parent or affiliated entity.

- 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.

<b>Accounting Unit Type</b> --None--	<b>Accounting Unit Number</b> 
* <b>Accounting City</b> SAN FRANCISCO	* <b>Accounting State</b> California
* <b>Accounting Postal Code</b> 94104	<b>Accounting Postal Code Extension</b> 
* <b>Accounting Country</b> United States of America	

Enter name and telephone number of authorized person to contact at location of accounting records:

* <b>Accounting Contact Name</b> [REDACTED]	* <b>Accounting Contact Number</b> [REDACTED]
--	--

Save    Print PDF

◀ Previous   Next ▶

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

**BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT**

ASSESSOR-RECORDER  
APARTMENT HOUSE PROPERTY STATEMENT  
CITY & COUNTY OF SAN FRANCISCO

asklopp@sfgov.org • www.sfassessor.org  
DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION

This Statement is filled for year 20\_\_

General Information

Entity Name [REDACTED]	Property Id [REDACTED]
LA By [REDACTED] <small>Last time this was Audited</small>	Roll Unsecured
BLK LOT [REDACTED]	Doing Business As (DBA) [REDACTED]

Mailing Address

Mailing Care Of [REDACTED]	* Mailing Street Number [REDACTED]	<b>i</b> This is where your correspondences will be mailed to
Mailing Street Fraction --None--	Mailing Street Pre-Direction --None--	
* Mailing Street Name [REDACTED]	* Mailing Street Type Street	
Mailing Unit Type --None--	Mailing Unit Number [REDACTED]	
* Mailing City SAN FRANCISCO	* Mailing State California	
* Mailing Postal Code [REDACTED]	Mailing Postal Code Extension [REDACTED]	
* Mailing Country United States of America		

Location/Address of the Property

Location Address  
[REDACTED]

* Local Telephone Number [REDACTED]	Fax Number [REDACTED]	* E-Mail Address [REDACTED]
--	--------------------------	--------------------------------

Enter location of general ledger and all related accounting records (include zip code):

Accounting Care Of [REDACTED]	* Accounting Street Number [REDACTED]
Accounting Street Fraction --None--	Accounting Street Pre-Direction --None--
* Accounting Street Name [REDACTED]	* Accounting Street Type Street
Accounting Unit Type --None--	Accounting Unit Number [REDACTED]
* Accounting City SAN FRANCISCO	* Accounting State California
* Accounting Postal Code [REDACTED]	Accounting Postal Code Extension [REDACTED]
* Accounting Country United States of America	

Enter name and telephone number of authorized person to contact at location of accounting records:

* Accounting Contact Name [REDACTED]	* Accounting Contact Number [REDACTED]
---	---

Save Print PDF

Previous **Next**

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

INSTRUCTIONS INFO/ADDRESSES **PART II: QUESTIONS** UNIT TOTALS SCHEDULES A AND B DECLARATION BY ASSESSEE

**BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT**  
CAREFULLY READ AND FOLLOW THE ACCOMPANYING INSTRUCTIONS

1. If you no longer own this property as of January 1 of this year, show the name and mailing address of the new owner:

Name

Mailing Address

City  State  Zip

Zip Extension

\* 2. Enter the total number of units for the location listed  \* Do you live in one of the units?

3. During the period of January 1, 2020 through December 31, 2020:  
3(1) - Did any individual or entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity?

4. Do any other individuals, partnerships or corporations do business or own personal property (other than household furniture and personal effects of your tenants) located on your premises?

5. Do you hold furniture or equipment belonging to others on a loan, rental, or lease basis?

6. ENTER BELOW the number of fully furnished, partly furnished (e.g., stoves and refrigerators, not built-in), and unfurnished units. Also complete Schedule A of the back. Do not include, either here or in Schedule A, any unit in which you live.

Sleeping Room

Fully Furnished	Partially Furnished	Unfurnished
<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>

Studio

Fully Furnished	Partially Furnished	Unfurnished
<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>

2 Bedroom

Fully Furnished	Partially Furnished	Unfurnished
<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>

Larger

Fully Furnished	Partially Furnished	Unfurnished
<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>

\* 7. Supplies Cost

6. The Taxpayer checks the totals in **Unit Totals** section, then clicks the **Next** button.

The screenshot shows a web interface for the 'BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT'. At the top, a navigation bar includes 'INSTRUCTIONS', 'INFO/ADDRESSES', 'PART II: QUESTIONS', 'UNIT TOTALS' (highlighted with a red box), 'SCHEDULES A AND B', and 'DECLARATION BY ASSESSEE'. Below the navigation bar, the title 'BOE-571-R: APARTMENT HOUSE PROPERTY STATEMENT' is centered. The main content area is titled 'Unit Totals' and lists several categories with their respective counts: 'Total Sleeping Room' (2), 'Total Studio' (2), 'Total One Bed' (2), 'Total Two Bed' (2), 'Total Three Bed' (2), and 'Total Larger' (0). At the bottom left, there are 'Save' and 'Print PDF' buttons. At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red box.

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.** Complete the schedule as instructed. If a portion of the furniture used in your rental units has been placed in storage, include the cost in the schedule and enter in the remarks the address where stored. **Do not** include built-in appliances, installed carpeting, or drapes as furniture; such items are considered part of the building. **Include** ranges, refrigerators, dishwashers, etc., if not built-in.

**SCHEDULE B.** Complete the schedule as instructed. Include all equipment not reported in Schedule A. If you care to attach a schedule listing types of equipment separately, you may do so.

#### Schedule A - Furniture and Appliances

+ Reported Assets (Furniture and Appliances)

Action	* Year of Acquisition	* Original Installed Cost (NOT depreciated book value)
--------	-----------------------	--

#### Furniture and Appliances - Total Cost

\$0.00

Press Save button on bottom left to see updated Total

#### Schedule B - Other Furniture and Equipment

+ Reported Assets (Other Furniture & Equipment)

Action	* Year of Acquisition	* Original Installed Cost (NOT depreciated book value)
--------	-----------------------	--

#### Other Furniture Equipment - Total Cost

\$0.00

Press Save button on bottom left to see updated Total

#### Remarks

My Remarks

Save

Print PDF

Previous

Next

#### Schedule A - Furniture and Appliances

Action	* Year of Acquisition	* Original Installed Cost (NOT depreciated book value)
--------	-----------------------	--



2020

\$ 10000

#### Furniture and Appliances - Total Cost







\$0.00

Press Save button on bottom left to see updated Total


- 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.

Schedule A - Furniture and Appliances

+ Reported Assets (Furniture and Appliances)



Action	* Year of Acquisition	* Original Installed Cost (NOT depreciated book value)
 	2020	\$10,000.00
 	2010	\$5,000.00
 	2010	\$5,000.00

**Furniture and Appliances - Total Cost**  
\$20,000.00


 Press Save button on bottom left to see updated Total

Schedule B - Other Furniture and Equipment

+ Reported Assets (Other Furniture & Equipment)

Action	* Year of Acquisition	* Original Installed Cost (NOT depreciated book value)
 	2020	\$150,000.00

**Other Furniture Equipment - Total Cost**  
\$150,000.00

 Press Save button on bottom left to see updated Total

Remarks

My Remarks

Save

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: APARTMENT HOUSE PROPERTY STATEMENT**

**Note: The following declaration must be completed and signed. If you do not do so, it may result in penalties.**

*I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or 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 the person named as the assessee in this statement at 12:01 a.m. on January 1, 2019.*

**\* Ownership Type**

Other

If Ownership Type = Other, enter the Ownership Type here:

Other Own[er]

**\* Signature of Assessee or Authorized Agent**

Signature of Person Making Claim

**Date**

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

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.



**Certification Complete**

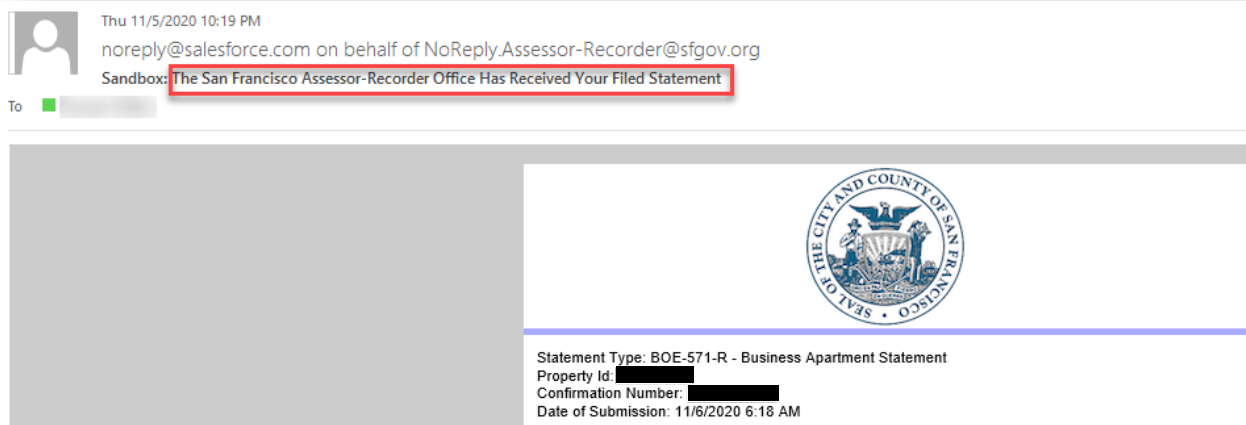
Thank you for electronically filing. Listed below is your confirmation number.

**Statement Type:** BOE-571-R - Business Apartment Statement  
**Property Id:** [REDACTED]  
**Confirmation Number:** [REDACTED]  
**Date of Submission:** October 29, 2020

You may view your e-Filed statement by clicking "View Statement" below.

[Home](#)

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

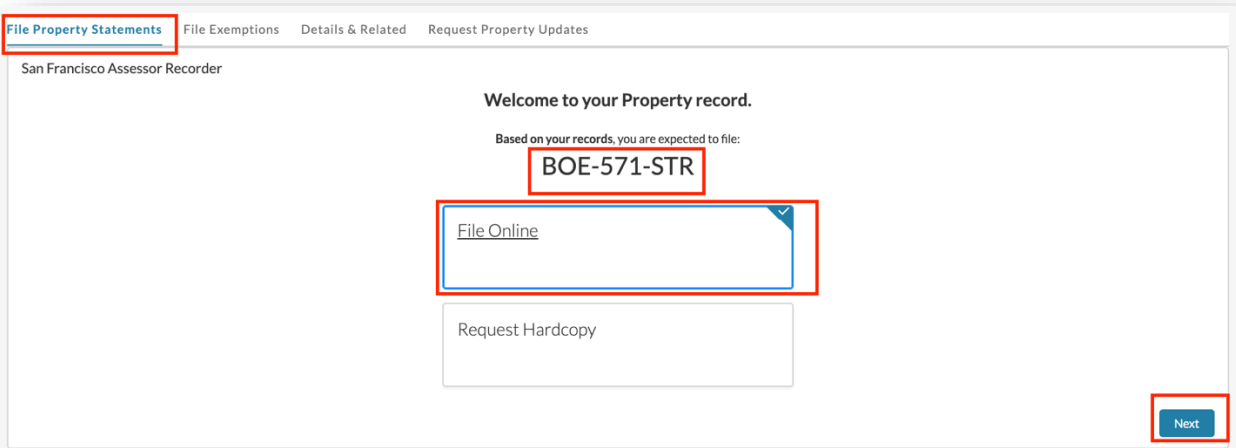


## Filing Form BOE-571-STR for Short Term Rental Property

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** tab 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)**



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

- 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.

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

Sign here

**BOE-571-STR: SHORT-TERM RENTAL PROPERTY STATEMENT**


*I declare under penalty of perjury under the laws of State of California that I have examined this property statement, including accompanying schedules, statements or 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 the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2021.*

<p>* Owner</p> <input type="text" value=""/> <p><small>Signature of Assessee or Authorized Agent</small></p>	<p>Date</p> <input type="text" value=""/> <p><small>The Signature Date will be populated upon submission.</small></p>	<div style="border: 1px solid gray; padding: 5px; display: inline-block;"> <b>THIS STATEMENT SUBJECT TO AUDIT</b> </div>
<p>* Name of Assessee or Authorized Agent</p> <input type="text" value=""/>	<p>Date</p> <input type="text" value="10/27/2020"/>	
<p>* Preparer's Name and Address</p> <input type="text" value=""/>	<p>Date</p> <input type="text" value=""/>	

THIS STATEMENT IS SUBJECT TO AUDIT

Submit

- 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**

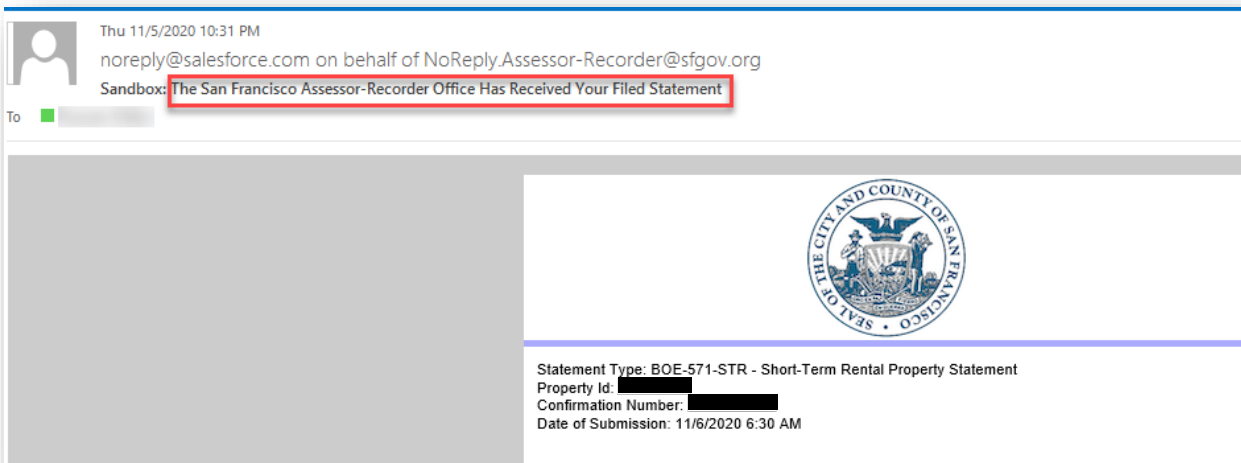
You may view your e-Filed statement by clicking "View Statement" below.

[Home](#)

Print

View Statement

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

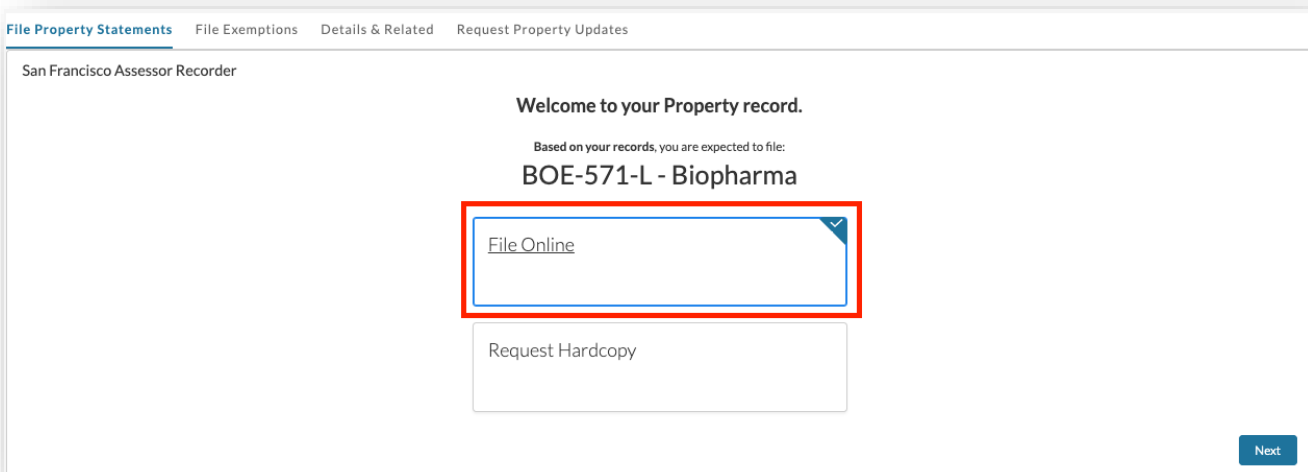


## Filing Form BOE-571-L Biopharma for Biopharmaceutical Company

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.

1. 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)**



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.

## 571-L - Biopharma: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$0.00	2. Equipment \$0.00	3. Leased Equipment \$0.00	4. Construction in Progress \$0.00	5. Leasehold Improvements \$0.00	<b>Total Reported Cost</b> \$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

Complete (a) thru (g)

\* a. Select type of business [REDACTED]

\* b. Enter local telephone number [REDACTED]

Fax Number: [REDACTED]

\* c. Do you own the land at this business location?

\* Select subtype of business [REDACTED]

- None--
- ✓ Biotech
- General
- Laboratory

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



# 571-L - Biopharma: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$0.00	2. Equipment \$0.00	3. Leased Equipment \$0.00	4. Construction in Progress \$0.00	5. Leasehold Improvements \$0.00	<b>Total Reported Cost</b> \$0.00
-----------------------	------------------------	-------------------------------	---------------------------------------	-------------------------------------	--------------------------------------

My Property Location    Part I: General Info    Part II: Property Belonging to You    Part III: Property Belonging to Others    Submit

## STATE BOARD OF EQUALIZATION

### QUALIFICATIONS FOR A BIOPHARMACEUTICAL INDUSTRY EQUIPMENT AND FIXTURES

The California State Board of Equalization (SBE) has adopted in July 2008 (effective as of January 1, 2009 lien date) guidelines for the assessment of biopharmaceutical industry equipment and fixtures that meet the criteria as defined below. Instructions for reporting the specific types of property are addressed by the SBE guidelines (AH 581) on the Business Property Statement (571-L). The San Francisco County Assessor's Office requests that you **notify us if your equipment and fixtures located in San Francisco County meet the State Board of Equalization's criteria by signing and returning this form**. You may return this form with your 571-L.

The State Board of Equalization defines the qualifying biopharmaceutical industry equipment and fixtures as follows:

*Equipment and fixtures utilized in connection with, or in support of, research and/or manufacturing activities that use organisms, or materials derived from organisms, their cellular, subcellular, or molecular components, to discover and/or provide products for human or animal therapeutics, diagnostics, and/or vaccines*

Specific equipment and fixtures owned and/or used meeting the above criteria as described shall use the following reporting categories when completing Form 571-L:

Form 571-L Category	Description
<b>Schedule A</b>	
Column 1 - Machinery & Equipment	General Laboratory Equipment and High Tech Analytical Instruments
Column 3 - Other Equipment	Commercial Manufacturing Equipment
Column 4 - Tools, Dies, Jigs	Pilot Scale Manufacturing Equipment
<b>Schedule B</b>	
Column 2 - Fixtures	Fixtures and Process Piping

A sample listing of the equipment and fixtures covered by LTA 99/54 is attached

Firm Name [REDACTED] Account No. [REDACTED]

meets the State Board of Equalization's criteria for biopharmaceutical industry equipment and fixtures for its property located in San Francisco County and requests assessment as a biopharmaceutical firm.

\* Signature of Person Making Claim  
[REDACTED]

Schedule A  
Machinery and Equipment

General Laboratory Equipment	Hi-tech Analytical Instruments
Analytical Balances Anesthetic Machines Animal Cages Autoclaves Autosamplers Bacteria Identification Systems Cameras used in research Centrifuges (and rotors) Chart Recorders Conductivity Monitors Control Valves (laboratory scale) Densitometers Digital Counters Evaporator Fermentors (<100 liters) Fume Hoods (portable) Glass Handling Equipment Glassware Washers Glucose Analyzers Ice Machines Imaging Equipment Incubators Liquid Samplers Micromanipulators Microscopes Microtomes Optical Scanning Detectors Organic Synthesizers Osmometers Ovens pH Analyzers Pipettes Pumps (laboratory scale) Radiation Monitors Reactor Vessels (< 100 liters) Refrigerators and Freezers Sample Handling Equipment Samplers Shakers Sterilizers Stirrers Ultrasonic Cleaning Systems Waterbaths	Cell Fusion Devices Cell Sorting Instruments - FACS Chemstations - computer controlled Cryostats Chromatography - Desktop Cytometry Instruments DNA Sequencers and Analyzers DNA Synthesizers and Purifiers Electrolyte Analyzers Electron Scanning Microscopes Electrophoresis - Gas or Liquid Mass Spectrometers -NMR, FTIR, AA, MALDI Molecular Imaging Equipment Particle Counters and Analyzers Peptide Synthesizers and Sequencers Protein Synthesizers Scintillation Counters Spectrometers Spectrophotometers Thermal Analysis Instruments Viscometers X-Ray Diffractometers Other unspecified equipment that is similar in character, scale and technology

**Sign & Submit**

I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or 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 the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2020.

* Signature of assessee or authorized agent <input type="text"/>	* Date <input type="text"/>
* Name of Assessee or Authorized Agent <input type="text"/>	* Title of Assessee or Authorized Agent <input type="text"/>
* Name of Legal Entity <input type="text"/>	Federal Employer ID Number <input type="text"/>
* Preparer's Name and Address <input type="text"/>	* Title of Preparers <input type="text"/>
* Telephone Number <input type="text"/>	Remarks <input type="text"/>

THIS STATEMENT IS SUBJECT TO AUDIT

## 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.

1. 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)**

Property [REDACTED]

Record Type: Leased Equipment    Type: Lessor    Account Name: [REDACTED]    Entity ID: [REDACTED]    Doing Business As: [REDACTED]    Property ID: [REDACTED]

File 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 - Leasing**

File Online

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*.

## 571-L - Leasing: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$0.00	2. Equipment \$0.00	3. Leased Equipment \$0.00	4. Construction in Progress \$0.00	5. Leasehold Improvements \$0.00	<b>Total Reported Cost</b> \$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

Complete (a) thru (g)

\* a. Select type of business  
Leasing

\* Select subtype of business  
--None--

b. Enter local telephone number  
[REDACTED]

Email address  
[REDACTED]

Fax Number:  
[REDACTED]

\* c. Do you own the land at this business location?  
Yes

\* If yes, is the name on your deed recorded as shown on this statement?  
Yes

\* d. When did you start business at this location?  
[REDACTED]

If your business name or location has changed from last year, enter the former name and/or location  
[REDACTED]

\* e. Enter location of general ledger and all related accounting records (include zip code):  
[REDACTED] [Edit](#)

\* f. Name of authorized person to contact at location of accounting records  
[REDACTED]

\* Telephone number of authorized person to contact at location of accounting records  
[REDACTED]

g. During the period of January 1, 2020 through December 31, 2020

\* (1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity?  
Yes

\* (2) If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of the acquisition?  
Yes

(3) If YES to both questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.

Remarks  
Lessor's Remarks

[Back](#) [Next](#) [Print PDF](#)

- 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 Location > Part I: General Info > **Part II: Property Belonging to You** > Part III: Property Belonging to Others > Submit

Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change its cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

**Compare to Last Year's Assessed Costs**

Cancel Save New

Please attach the details of your reported assets by clicking the 'Upload Files' button below. Note: This is required for leasing companies.

Add attachment

Upload Files Or drop files

Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
ATMs	2020	Leased Equipment		\$123	
Furniture and Appliances	2020	Leased Equipment		\$321	
Machinery & Equipment	2020	Leased Equipment		\$100	test

Cancel Save New

Remarks

test

Please check this box if taxpayer has provided incomplete information

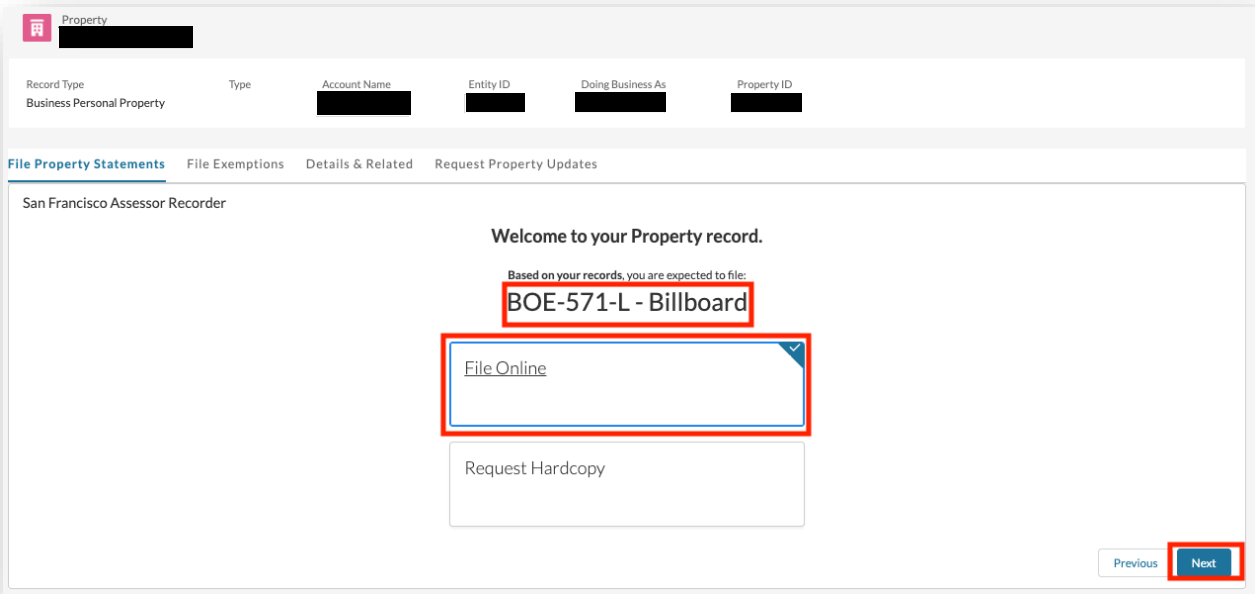
Back Next Print PDF

## 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.

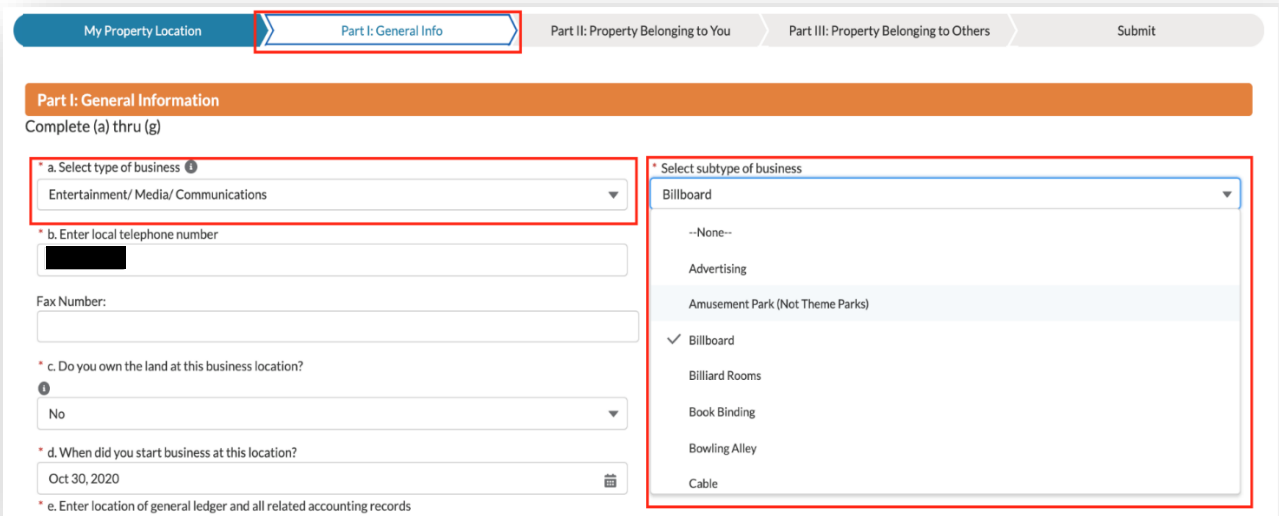
1. The Taxpayer navigates to the Property (Billboard Company), clicks on **File Online** link within **File Property Statements** tab and then clicks the **Next** button to start the filing process. Clicking **Next** button creates a 571-L Billboard statement for the property (if one does not already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

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



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:

- a. In **Part I: General Information** section, the Taxpayer chooses **Entertainment/Media/Communication** as business type and selects the appropriate subtype of their business.



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

571-L - Billboard: Business Personal Property Statement

Property: [REDACTED]

1. Supplies \$0.00	2. Equipment \$0.00	3. Leased Equipment \$0.00	4. Construction in Progress \$0.00	5. Leasehold Improvements \$0.00	<b>Total Reported Cost</b> \$0.00
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My Property Location | Part I: General Info | **Part II: Property Belonging to You** | Part III: Property Belonging to Others | Submit

Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

[Compare to Last Year's Assessed Costs](#)

Cancel Save New

Please attach the details of your reported assets by clicking the 'Upload Files' button below. Note: This is required for leasing companies.

Add attachment

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 additional information if needed.

I certify that I have no individual Asset Classification Line Items

Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
<p>Cancel Save New</p>					

Back Next Print PDF

## 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.

1. 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: [REDACTED]

Record Type: Business Personal Property | Type: Apartment Unit | Account Name: [REDACTED] | Entity ID: [REDACTED] | Doing Business As: [REDACTED] | Property ID: [REDACTED]

**File 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

- 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.

### 571-LA: Business Personal Property Statement

Property: [REDACTED]

1. Total Counterlines Partitions etc Cost	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 \$0	Total Reported Cost \$0
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My Property Location | Part I: General Info | Part II: Property Belonging to You | Part III: Property Belonging to Others | Submit

**Provide your name and mailing address**

Name: [REDACTED] | Mailing Address: [REDACTED] | Edit

**Business Location**

Property name: [REDACTED] | Roll Code: Secured

Remarks: [REDACTED]

Back | Next | 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.

571-LA: Business Personal Property Statement

Property: [REDACTED]

1. Total Counterlines Partitions etc Cost    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 \$0    **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 I: General Information**  
Complete (a) thru (g)

\* a. Select type of business     \* Select subtype of business

\* b. Enter local telephone number     \* Email address

Fax Number:

\* c. Do you own the land at this business location?

\* d. When did you start business at this location?

\* e. Enter location of general ledger and all related accounting records (include zip code):

\* f. 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

\* (1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity?

Remarks

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

Biotech	Biotech
	General
	Laboratory
Cleaning	Car Wash
	Dry Cleaning
	General
	Janitorial Service
	Laundry – Commercial/Clothes Cleaning Service
	Laundry – Self Operating/Coin Operated
Construction	Batch Plants (Concrete & Asphalt)
	Demolition Contractor
	General
	Sand/Dirt/Gravel – Retail/Wholesale Suppliers
Entertainment/ Media/ Communications	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)
	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
Food Services	Bakery
	Bottling Plants (Other Than Breweries)
	Breweries
	Food Processing
	General
	Grocery/Supermarket
	Warehousing
	Winery
Health	Biotech
	Convalescent Care
	Dental Lab
	Drug/Pharmaceutical Mfg
	General
	Health Clubs/Gyms
	Laboratory
	Medical/Dental
	Pharmacy And Drug Store
	Veterinary Hospital
Leasing	-None-
Lodging	Apartment
	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

Manufacturing	Circuit Board Mfg
	Cogeneration (Power Plants)
	Dental Lab
	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
Other Services	Banking/Financial Institution
	Cable
	Dry Cleaning
	Financial Services
	Floor Covering and Installation Services
	Gas/Service Station
	General
	Insurance Services
	Janitorial Services
	Laboratory
	Mortuaries
	Recyclers
	Telephone & Communication
Printing	Book Binding
	General
	Offset Lithographic Printing Press
	Photo Labs – Commercial
	Photo Labs – One Hour

	Post-Presses
	Pre-Presses
	Presses
Property Management	Building/Parking Management
	General
	Janitorial Service
Retail/Wholesale	General
	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-LA: Business Personal Property Statement

Property: [REDACTED]

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	<b>Total Reported Cost</b> \$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

### Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

Compare to Last Year's Assessed Costs

Cancel Save **New**

Add attachment

**Upload Files** Or drop files

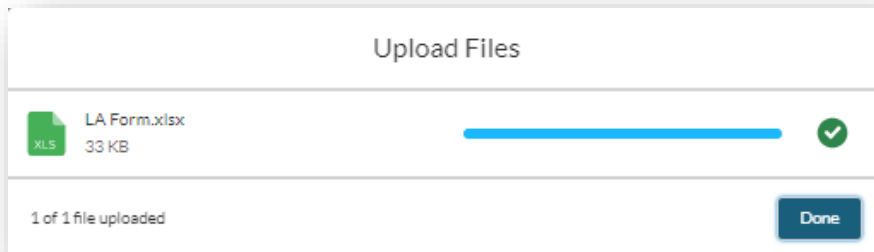
You are still required to enter individual asset line items even if you upload a file. Uploading a file is meant to provide additional information if needed.

Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
ATMs	2020	Alternate Schedule A		\$134	
Counterlines, Partitions, Cafeteria Equipment, etc.	2020	Alternate Schedule A		\$41,561	
Leasehold Improvements - Fixtures	2020	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr		\$2,132	
Leasehold Improvements - Structure	2020	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr		\$9,763	

Cancel Save **New**

Remarks

Back Next Print PDF



- 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.

Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

Compare to Last Year's Assessed Costs

Cancel Save New

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 additional 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
Construction in Progress	2020	Construction in Progress		\$30,000.00	
ATMs	2019	Alternate Schedule A	\$2,000.00	\$2,000.00	
Machinery & Equipment	2018	Equipment	\$23,000.00	\$23,000.00	

Cancel Save New

Remarks

Back Next Print PDF

- 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

- 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
Leasehold Improvements - Fixtures	2020	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr		50000	
Leasehold Improvements - Structure	2020	Bldg/Bldg Impr/Leasehold Impr/Land/Land Impr		\$10,000.00	

Buttons: 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: Business Personal Property Statement

Property: [REDACTED]

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	<b>Total Reported Cost</b> \$53,590
--	--	-------------------------------------	-----------------------------	--	--	--	--

Progress: My Property Location | Part I: General Info | **Part II: Property Belonging to You** | Part II - Schedule D | Part III: Property Belonging to Ot... | Submit

#### Part II: Declaration of Property Belonging to You

Below for your convenience, please find a list of assets reported last year. To make a change, please click on the pencil icon beside any asset to edit the value or click New to add a new asset not previously reported. Click Save to save changes; Cancel button will restore the list to when it was last saved. When finished, click Save and Next in order to move on to the next page of the form. If you need to remove an item, click on the pencil to change it's cost to \$0. If applicable, details related to recent acquisitions or disposals will be entered in the Schedule D in Part II, before you proceed to Part III.

Compare to Last Year's Assessed Costs

Buttons: Cancel, Save, New

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 additional information if needed.

I certify that I have no individual Asset Classification Line Items' by default

Asset Classification	Acquisition Year	Property Category	Last Year's Assessed Cost	This Year's Reported Cost	Description of This Year's Reported Cost
----------------------	------------------	-------------------	---------------------------	---------------------------	--

Buttons: Cancel, Save, **New**

Remarks: [Text Area]

Buttons: Back, **Next**, Print PDF

**The Taxpayer must either enter an Asset or click the certification button that there are no assets to declare.**

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.



## 571-LA: Business Personal Property Statement

Property: [REDACTED]

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	6. Total Drive-up/Walk- up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	<b>Total Reported Cost</b> \$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

### Part II - Schedule D

✓ You have reported a cost of \$9,763.00 in Leasehold Improvements - Structure with acquisition year 2020 for a Net change of \$9,763.00.

Please click here to provide more information of the Acquisitions or Disposals that caused this change.

New

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
------	----------------------------	---------------------------	------	-------------	--

✓ You have reported a cost of \$2,132.00 in Leasehold Improvements - Fixtures with acquisition year 2020 for a Net change of \$2,132.00.

Please click here to provide more information of the Acquisitions or Disposals that caused this change.

New

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
------	----------------------------	---------------------------	------	-------------	--

Remarks

Back

Next

Print PDF

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

* Type	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 Belonging to You** section.

571-LA: Business Personal Property Statement

Property: [REDACTED]


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	6. Total Drive-up/Walk-up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$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

Part II - Schedule D


✓ You have reported a cost of \$9,763.00 in Leasehold Improvements - Structure with acquisition year 2020 for a Net change of \$9,763.00.

New

Type	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 Improvements - Fixtures with acquisition year 2020 for a Net change of \$2,132.00.

New

Type	Month of Addition/Disposal	Year of Addition/Disposal	Cost	Description	
Addition	March	2020	\$2,132	more additions	

Remarks

Back **Next** Print PDF

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: Business Personal Property Statement

Property: [REDACTED]

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	6. Total Drive-up/Walk-up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	<b>Total Reported Cost</b> \$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

### Part III: Declaration of Property Belonging to Others

If 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 or 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

Add attachment

Upload Files Or drop files

Lessor's Name	Tax Obligation	Leased Equipment Type	Year of Acq.	Cost to Purchase	Annual Rent	Description
---------------	----------------	-----------------------	--------------	------------------	-------------	-------------

Cancel Save New

I certify that I have no property to report that belongs to others

Remarks

[REDACTED]

Back Next Print PDF

The Taxpayer must add a Lessor's Name or click the certification button that there is no Lessor to declare.

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	[REDACTED]
Lessor's Mailing address	[REDACTED]
Tax Obligation	Lessor
* Acquisition Year	2020
Manufacture Year	2019
Description	[REDACTED]
Leased Number	[REDACTED]
* Cost	\$10,000.00
Annual Rent	\$500.00
Cancel Save	

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

**571-LA: Business Personal Property Statement**

Property: [REDACTED]

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	6. Total Drive-up/Walk-up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	<b>Total Reported Cost</b> \$63,590
---	--	-------------------------------------	-----------------------------	--	--	--	--

My Property Location > Part I: General Info > **Part II: Property Belonging to You** > Part II - Schedule D > Part III: Property Belonging to Ot... > Submit

**Part III: Declaration of Property Belonging to Others**

If 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 or 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

Add attachment

Upload Files Or drop files

Lessor's Name	Tax Obligation	Leased Equipment Type	Year of Acq.	Cost to Purchase	Annual Rent	Description
[REDACTED]	Lessor	Government-owned property	2020	\$10,000	\$500	

Cancel Save New

Remarks

Back **Next** Print PDF

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

## 571-LA: Business Personal Property Statement

Property: [REDACTED]

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 \$10,134	5. Total Vault Door Night Depositories Cost \$0	6. Total Drive-up/Walk- up Window Kiosk Cost \$0	7. Leasehold Improvements Cost \$11,895	<b>Total Reported Cost</b> \$63,590
--	---	--	--------------------------------	---	--	---	--

My Property Location

Part I: General Info

Part II: Property Belonging to You

Part II - Schedule D

Part III: Property Belonging to Ot...

Submit

### Sign & Submit

I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or 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 the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2021.

\* Signature of assessee or authorized agent

[REDACTED]

\* Date

[REDACTED]

\* Name of Assessee or Authorized Agent

[REDACTED]

\* Title of Assessee or Authorized Agent

Owner

\* Name of Legal Entity

[REDACTED]

Federal Employer ID Number

[REDACTED]

\* Preparer's Name and Address

[REDACTED]

\* Title of Preparer

Owner

\* Telephone Number

[REDACTED]

Business Description

--None--

Ownership Type

Proprietorship

Remarks

[REDACTED]

Back

Submit

Print PDF

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 Complete**

Thank you for electronically filing. Listed below is your confirmation number.

Statement Type: **BOE-571-L & BOE-571-LA - Financial Institution or Insurance Company**  
 Property Id: [REDACTED]  
 Confirmation Number: [REDACTED]  
 Date of Submission: **November 6, 2020**


You may view your e-Filed statement by clicking “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**

To: [REDACTED]



Statement Type: BOE-571-L & BOE-571-LA - Financial Institution or Insurance Company  
 Property Id: [REDACTED]  
 Confirmation Number: [REDACTED]  
 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.

Home 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.

**Getting Started in Community**  
To get started, click the button below 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 linked, you will be able to see all the associated Properties below. You may also link multiple Accounts and Properties.

**Request a Replacement PIN**  
To request a replacement Entity ID and 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 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 above. There you can also view your past filings, assessment history, and any customer service cases.

[Add Account/Property](#)

**Filing Statements and Viewing Property Details**  
To file BPP statements and/or exemptions 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 Accounts linked to view information and request updates.

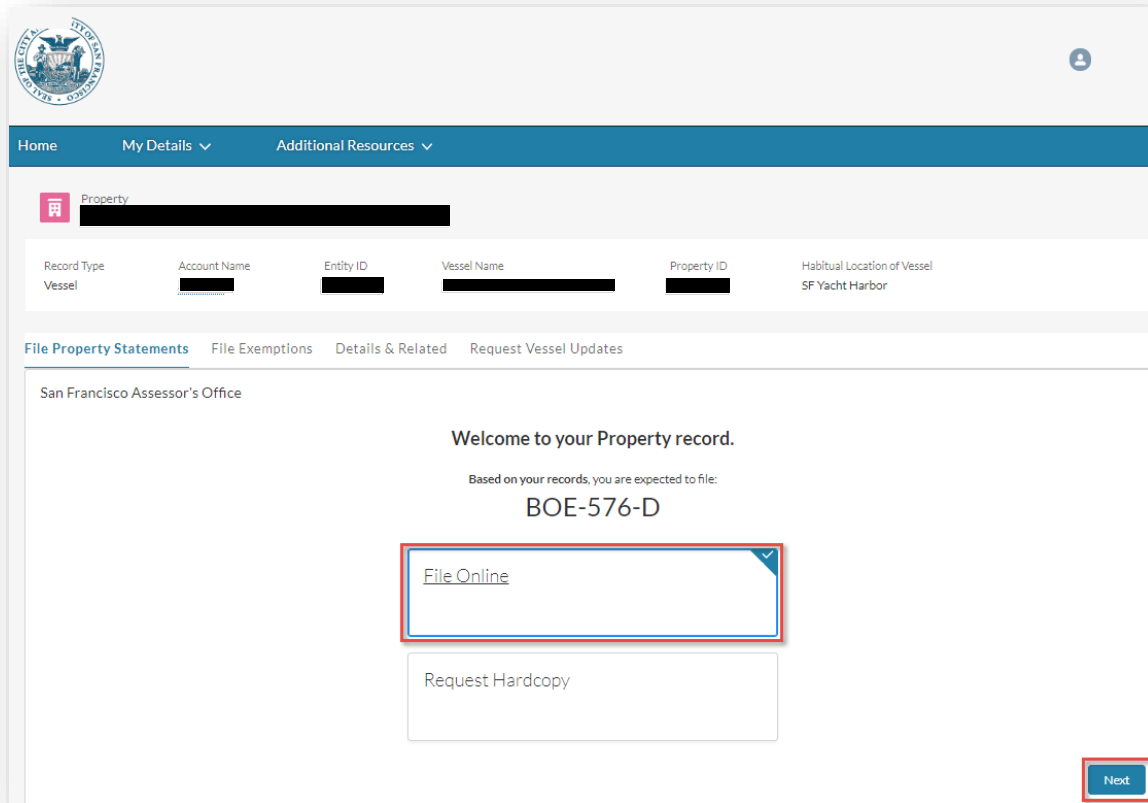
**Properties** Accounts/Businesses

Properties  
My Properties

3 items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated a few seconds ago

	Property Name ↑	Status	Account Name
1	██████████	Active	██████████
2	████████████████████	Active	██████████
3	██████████	Active	██████████

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



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



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 filed 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:

- **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 vessel's 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, or other equipment.

**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 assessee'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 of authorization.

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.

Save Print PDF Next ▶

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.

The screenshot shows the 'BOE-576-D: VESSEL PROPERTY STATEMENT' form, specifically Section I. The navigation bar at the top includes 'INSTRUCTIONS', 'GENERAL INFO', 'SECTION I', 'SECTION II', 'SECTION III', and 'DECLARATION'. The form is titled 'For Assessor's Use Only' and contains the following fields:

- Vessel Id:** A text field containing a redacted value.
- Vessel Name:** A text field containing 'Vessel Property'.
- Name and Mailing Address:** A section containing multiple fields:
  - \* Account Name:** Text field with 'Test Account'.
  - \* Contact Name:** Text field with 'Vessel Property'. A tooltip indicates 'This is where your correspondences will be mailed to'.
  - Mailing Care Of:** Text field.
  - \* Mailing Street Number:** Text field with a redacted value.
  - Mailing Street Fraction:** Dropdown menu with '--None--' selected.
  - Mailing Street Pre-Direction:** Dropdown menu with '--None--' selected.
  - \* Mailing Street Name:** Text field with a redacted value.
  - \* Mailing Street Type:** Dropdown menu with 'Street' selected.
  - Mailing Unit Type:** Dropdown menu with '--None--' selected.
  - Mailing Unit Number:** Text field.
  - \* Mailing City:** Text field with 'San Francisco'.
  - \* Mailing State:** Dropdown menu with 'California' selected.
  - \* Mailing Postal Code:** Text field with a redacted value.
  - Mailing Postal Code Extension:** Text field with a redacted value.
  - \* Mailing Country:** Dropdown menu with 'United States of America' selected.

At the bottom of the form, there are buttons for 'Save', 'Print PDF', 'Previous', and 'Next'. The 'Next' button is highlighted with a red box.

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.

INSTRUCTIONS   GENERAL INFO   **SECTION I**   SECTION II   SECTION III   DECLARATION

Section I: Must be completed Annually

\* Vessel Name

\* CF Number/Vessel Registration Number  
  
The vessel ID issued by either DMV or US Coast Guard

Vessel ID Type  
  
Select whether the CF Number/Vessel Registration Number entered previously was provided by the DMV or US Coast Guard

\* Habitual Location of Vessel

Slip Number

\* Telephone Number

Save        

- 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 PROPERTY STATEMENT

Section II: Complete if First Time Filing or if any Change Within the Last Calendar Year

<b>* Vessel Manufacturer</b> Boeing	<b>Vessel Model</b> CAT-1969
<b>* Vessel Year</b> 2015 <small>Vessel Manufacture Year</small>	<b>HIN</b>  <small>Hull Identification Number</small>
<b>* Length</b> 42.00 <small>Measured in feet</small>	<b>Beam</b>  <small>Measured in feet</small>
<b>Draft</b>  <small>Measured in feet</small>	<b>Vessel Displacement</b>  <small>Net Tons</small>
<b>Gross Tons</b>  <small>Coast Guard Documented</small>	<b>Net Tons</b> 60.00
<b>Engine Manufacturer</b>  <small>Number of Engines</small>	<b>Engine Model</b>  <small>Engine HP Each</small>
<b>Number of Engines</b> 1	<b>Engine HP Each</b> 30.00 <small>Vessel Engine horsepower, for each individual engine if there are more than one.</small>
<b>Engine Year</b> 2000	<b>Last County Assessed</b>  <small>Date Vessel First Moved to County</small>
<b>Taxes Paid</b> \$ <small>Taxes Paid in the previous year</small>	<b>Date Vessel First Moved to County</b> mm/dd/yyyy

If Net Tons is >50, a vessel exemption will be generated.

1. Purchase Information

<b>Purchase From</b> <input type="text"/>	<b>Purchase Price</b> \$ <input type="text"/>	<small>when you purchased the vessel</small>
<input type="checkbox"/> Purchased with Engine?	<input type="checkbox"/> Purchased with Trailer?	
<b>Address (city, county, state, zip code)</b> <input type="text"/>	<b>Purchase Date</b> mm/dd/yyyy	

Sale Information

<b>Sold To</b> <input type="text"/>	<b>Sale Price</b> \$ <input type="text"/>	<small>if you sold the vessel</small>
<input type="checkbox"/> Sold with Engine?	<input type="checkbox"/> Sold with Trailer?	
<b>Address (city, county, state, zip code)</b> <input type="text"/>	<b>Sale Date</b> mm/dd/yyyy	

Removal Information

<input type="checkbox"/> Vessel Permanently Removed from County	<b>Address moved To (city, county, state, zip code)</b> <input type="text"/>	<small>if the vessel left San Francisco</small>
<b>Removal Date</b> mm/dd/yyyy		

Vessel Classifications

<b>* Boat Type</b> Power Boat	<b>Power Boat Type - Other</b> <input type="text"/> <small>This is required to fill out if you select Other as the Power Boat Type.</small>
<b>Vessel Classifications</b>	
<b>* Power Boat Type</b> Motor Yacht	
<b>Hull Type</b> --None--	
<b>Hull Material</b> --None--	
<b>* Condition When Purchased</b> Average	
<b>* Current Vessel Condition</b> Average	
<b>Intended Use</b> Other	
<b>Intended Use - Other</b> Service business	
<b>Propulsion</b> --None--	
<b>Engine Fuel Type</b> --None--	

- 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.

The screenshot shows the top navigation bar with links for INSTRUCTIONS, GENERAL INFO, SECTION I, SECTION II, SECTION III (highlighted), and DECLARATION. Below the navigation bar is the title "BOE-576-D: VESSEL PROPERTY STATEMENT" and the section heading "Section III: Loss". The main content area contains the instruction: "Explain exact nature of loss and include all supporting documentation, i.e., accident report, police report, Coast Guard report or insurance report. Note: If repossessed, include a copy of the original repossession notification from the lending institution." Below this is a large text input field. Further down, there is another instruction: "ADDITIONS/MODIFICATIONS - Explain any additional modifications to the vessel since purchase, i.e., extension, railing, upper deck or cabin, canopy, flybridge, interior, or cabinetry." followed by another text input field.

The screenshot shows a section titled "ATTACH STATEMENT REGARDING ANY ADDITIONAL INFORMATION YOU FEEL WOULD ASSIST US IN VALUING YOUR VESSEL. IF OWNERSHIP TYPE IS LLC, PLEASE ATTACH A LIST OF MEMBERS NAMES." Below the title is a dashed box containing a "Choose File" button and the text "No file chosen". Below the dashed box is an "Upload document" button with a download icon. Below the upload button is a table with the following structure:

Action	Document Name	Update Date/Time
--------	---------------	------------------

At the bottom of the section are "Save" and "Print PDF" buttons on the left, and "Previous" and "Next" navigation buttons on the right.

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

Declaration by Assessee

**BOE-576-D: VESSEL PROPERTY STATEMENT**

**Note: The following declaration must be completed and signed. If you do not do so, it may result in penalties.**

I certify (or declare) under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or 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 the person named as the assessee in this statement at 12:01 a.m. on January 1, 2021.

**Ownership Type**

Proprietorship

**\* Signature of Assessee or Authorized Agent**

[Redacted Signature]

**Date**

[Redacted Date]

*The Signature Date will be populated upon submission.*

**\* Title**

Mr.

**\* Name of Assessee or Authorized Agent**

[Redacted Name]

**\* Name of Legal Entity (other than DBA)**

Vessel Property

**Federal Employer ID Number**

[Redacted FEIN]

*Enter FEIN (also known as Tax ID). Please do not enter SSN.*

**\* Preparer's Title**

Mr.

**\* Preparer's Name**

[Redacted Name]

**\* Preparer's Address**

[Redacted Address]

**\* Preparer's Telephone**

[Redacted Telephone]

**\* Preparer's Email Address**

[Redacted Email]

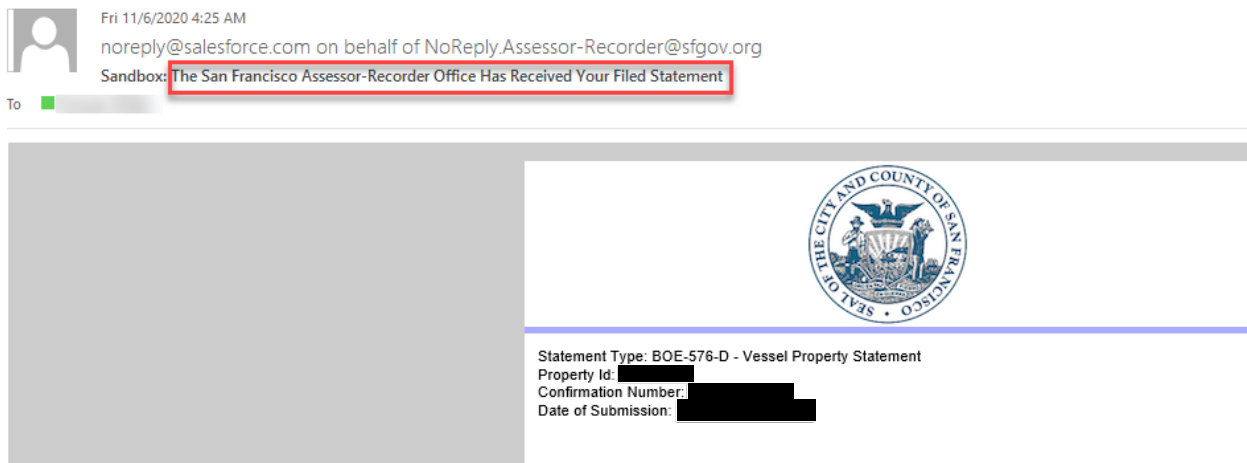
*THIS STATEMENT IS SUBJECT TO AUDIT*

Save Print PDF

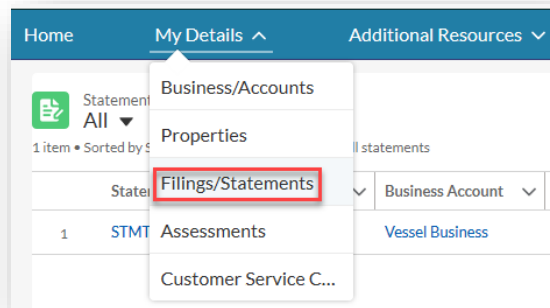
Submit

Previous

- 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.



Statements  
All ▾  
9 Items • Sorted by Statement Number • Filtered by All statements

	State...	Amend...	Busines...	Property	Form	Status	File Date	As...	File...
1	STMT-00000		Test Account	Test BPP 1 @	BOE-571-STR - Short-Term Rental Property Statement	Received	10/30/2020	2021	eFile
2	STMT-00001	STMT-00000	Test Account	Test BPP 1 @	BOE-571-STR - Short-Term Rental Property Statement	Received	10/30/2020	2021	eFile
3	STMT-00002		Test Account	Test BPP 2 @	BOE-571-STR - Short-Term Rental Property Statement	Received	10/30/2020	2021	eFile
4	STMT-00006		Test Account	Rental Property @	BOE-571-R - Business Apartment Statement	Received	11/6/2020	2021	eFile
5	STMT-00007	STMT-00002	Test Account	Test BPP 2 @	BOE-571-STR - Short-Term Rental Property Statement	Received	11/6/2020	2021	eFile
6	STMT-00008		Test Account	L Form Property @	BOE-571-L & BOE-571-LA - Financial Institution or Insurance Co...	Received	11/6/2020	2021	eFile
7	STMT-00009	STMT-00000	Test Account	Test BPP 1 @	BOE-571-STR - Short-Term Rental Property Statement	Received	11/6/2020	2021	eFile
8	STMT-00010		Test Account	Rental Property 2 @	BOE-571-R - Business Apartment Statement	Received	11/6/2020	2021	eFile
9	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.

Home My Details ▾ Additional Resources ▾

Property [REDACTED]

Vessel Name	Property ID	Habitual Location of Vessel	Status
[REDACTED]	[REDACTED]	Fisherman's Wharf	Active

File Property Statements **File Exemptions** Details & Related Request Vessel Updates

San Francisco Assessor's Office

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.



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.

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.

GENERAL INFORMATION **FILING YEAR** APPLICANT INFORMATION VESSEL INFORMATION CERTIFICATION

BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

20\_\_ Affidavit for 4 Percent Assessment of Certain Vessels

Claim Fiscal Year

2020

This claim must be filed by **Year is pre-filled**

**i** 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 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.

GENERAL INFORMATION FILING YEAR **APPLICANT INFORMATION** VESSEL INFORMATION CERTIFICATION

### BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

\* Applicant First Name  Applicant Middle Name

\* Applicant Last Name  Applicant Title

Corporation, Partnership, DBA

Mailing Care Of  \* Mailing Street Number

Mailing Street Fraction  Mailing Street Pre-Direction

\* Mailing Street Name  \* Mailing Street Type

Mailing Unit Type  Mailing Unit Number

\* Mailing City  \* Mailing State

\* Mailing Postal Code  Mailing Postal Code Extension

Mailing Country

Save  Print PDF

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
United States Coast Guard	Vessel Name Port of Documentation Fish and Game Boat Number Vessel Activity Commercial Fishing Fish and Game Boat Number Commercial Passenger Fishing

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

GENERAL INFORMATION   FILING YEAR   APPLICANT INFORMATION   **VESSEL INFORMATION**   CERTIFICATION

BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

Complete the following, as applicable:

\* The applicant or organization is the owner of a vessel that is:

registered by the California Department of Motor Vehicles

CF number:

The vessel is engaged or employed *exclusively* in one or more of the following activities:

Commercial Fishing       Oceanographic Research       Commercial Passenger Fishing

*Taking and possession of fish or other living resource 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.*

Fish & Game Boat Number

**!** If Commercial Fishing or Commercial Passenger Fishing are checked above, provide the Fish & Game Boat Number

Save   Print PDF   Previous   **Next**

GENERAL INFORMATION   FILING YEAR   APPLICANT INFORMATION   **VESSEL INFORMATION**   CERTIFICATION

BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

Complete the following, as applicable:

\* The applicant or organization is the owner of a vessel that is:

documented by the United States Coast Guard

\* Vessel name: [REDACTED]

\* Port of documentation: San Francisco

The vessel is engaged or employed *exclusively* in one or more of the following activities:

Commercial Fishing       Oceanographic Research       Commercial Passenger Fishing

*Taking and possession of fish or other living resource 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.*

Fish & Game Boat Number [REDACTED]

**i** If Commercial Fishing or Commercial Passenger Fishing are checked above, provide the Fish & Game Boat Number

Save   Print PDF   Previous   **Next**

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

GENERAL INFORMATION FILING YEAR APPLICANT INFORMATION VESSEL INFORMATION **VESSEL UPLOAD** CERTIFICATION

### BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

Upload File(s)

**Browse...** No file selected.

**Upload document**

Action	Document Name	Update Date/Time
<input checked="" type="checkbox"/> I have uploaded a current certificate of inspection issued by the United States Coast Guard*		

Save  Print PDF ◀ Previous Next ▶

*Based on your previous response, you're required to submit supporting information. Please choose your file(s) below then click the Upload document button*

GENERAL INFORMATION FILING YEAR APPLICANT INFORMATION VESSEL INFORMATION **VESSEL UPLOAD** CERTIFICATION

### BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

Upload File(s)

**Browse...** No file selected.

**Upload document**

Action	Document Name	Update Date/Time
<input checked="" type="checkbox"/> I have uploaded 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.*		

Save  Print PDF ◀ Previous Next ▶

*Based on your previous response, you're required to submit supporting information. Please choose your file(s) below then click the Upload document button*

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

### BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

#### Certification

\* Signature of Applicant

Signature Date

The Signature Date will be populated upon submission.

Applicant Title

**i** I certify (or declare) under penalty of perjury under the 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.

Whom should we contact during normal business hours for additional information?

Name

E-mail Address

Daytime Telephone

#### Form Submission

Once you have filled out all the required information in each section, you will be able to submit this form.

THIS STATEMENT IS SUBJECT TO AUDIT

Save Print PDF

Submit

Previous

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



#### Certification Complete

Thank you for electronically filing. Listed below is your confirmation number.

Statement Type: BOE-576-E - Vessel Exemption

Property Id: [REDACTED]

Confirmation Number: [REDACTED]

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.

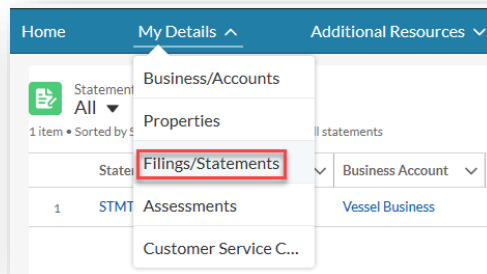


13. The Taxpayer receives an automated exemption approval or denial notice via email.

### 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.

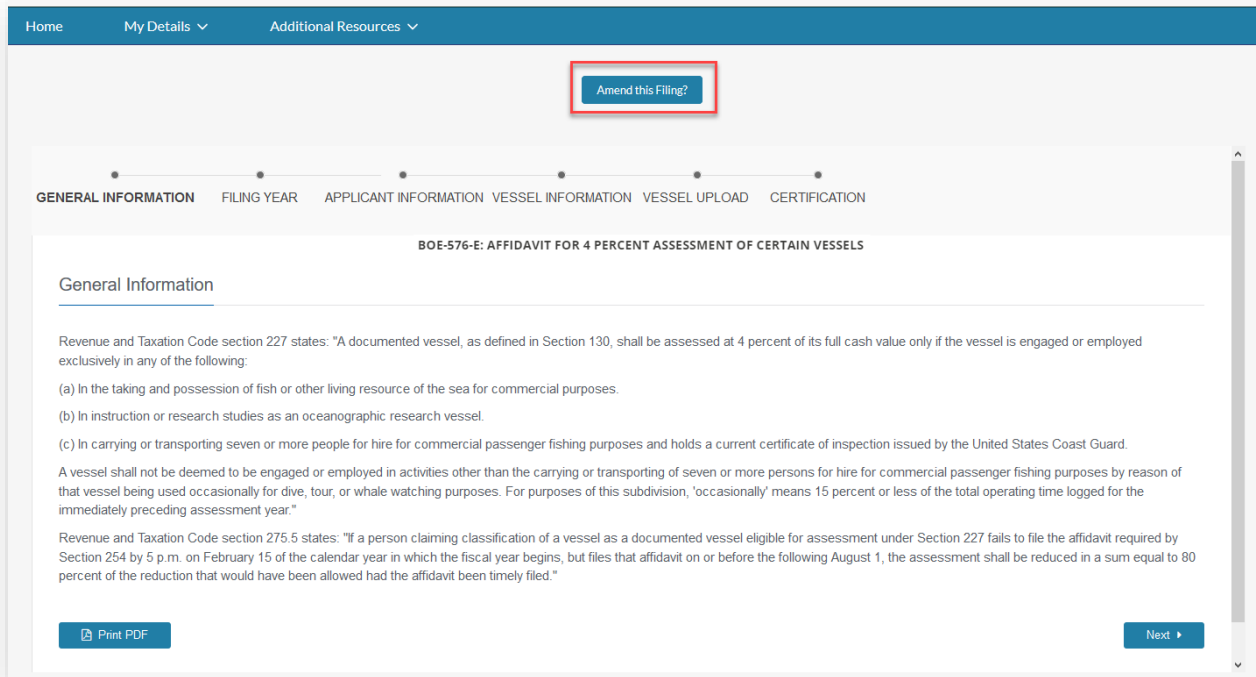
1. The Taxpayer can access a previously filed statement by navigating to the **My Details** menu and clicking the **Filings/Statements** menu item. The Taxpayer can click the **Statement Number** to view its details.



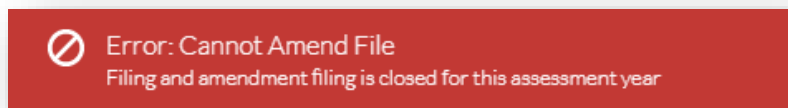
Statement N...	Amended...	Business Account	Property	Form	Status	File Date	Assessme...	Filing Me...
1		Vessel Business	[REDACTED]	BOE-576-E - Vessel Exemption	Submitted	7/29/2020	2020	eFile



- 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.



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



- 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.

## BOE-576-E: AFFIDAVIT FOR 4 PERCENT ASSESSMENT OF CERTAIN VESSELS

## Certification



I certify (or declare) under penalty of perjury under the 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.

## \* Signature of Applicant

## Signature Date

The Signature Date will be populated upon submission.

## Applicant Title

## Whom should we contact during normal business hours for additional information?

## Name

## E-mail Address

## Daytime Telephone

## Form Submission

Once you have filled out all the required information in each section, you will be able to submit this form.

THIS STATEMENT IS SUBJECT TO AUDIT

- 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

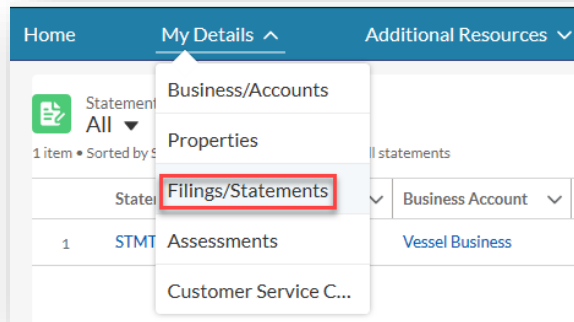
Thank you for electronically filing. Listed below is your confirmation number.

Statement Type: BOE-576-E - Vessel Exemption  
Property Id: [REDACTED]  
Confirmation Number: [REDACTED]  
Date of Submission: November 2, 2020

You may view your e-Filed statement by clicking "View Statement" below.

[Print](#) [View Statement](#)

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.



The screenshot shows the 'Statements' table with the following data:

Statement N...	Amended From	Business Account	Property	Form	Status	File Date	Assessm...	Filing M...
1	[REDACTED]	Vessel Business	[REDACTED]	BOE-576-E - Vessel Exemption	Submitted	7/29/2020	2020	eFile
2	[REDACTED]	Vessel Business	[REDACTED]	BOE-576-E - Vessel Exemption	Submitted	7/30/2020	2020	eFile

## 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	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.

The screenshot displays the user interface of the City and County of San Francisco Assessor-Recorder's web portal. At the top, there is a navigation bar with 'Home', 'My Details', and 'Additional Resources'. A central banner welcomes users and explains the portal's functionality for filing forms and managing accounts. Below the banner, there are three informational sections: 'Getting Started in Community', 'Request a Replacement PIN', and 'Accessing Additional Information'. A prominent blue button labeled 'Add Account/Property' is centered on the page. The lower portion of the page features a 'Properties' section with a table listing active properties. The table has columns for 'Property Name', 'Status', and 'Account Name'. The first row of the table is highlighted with a red border, indicating the property selected by the taxpayer.

Property Name	Status	Account Name
1 [REDACTED]	Active	[REDACTED]
2 [REDACTED]	Active	[REDACTED]
3 [REDACTED]	Active	[REDACTED]
4 [REDACTED]	Active	[REDACTED]

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

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

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 <b>Submit</b> button on the <b>Certification</b> page does not appear if these conditions are not met: <ul style="list-style-type: none"> <li>On the <b>Use of Property</b> page, question #7: <b>Is there a sanctuary (church) on or adjacent to this property?</b></li> <li>On the <b>Use of Property</b> page, question #9: <b>Are bingo games being operated on this property?</b></li> </ul>
2	BOE-267-A- Welfare Exemption (Annual)	Instructions Filing Info Property Info	The <b>Submit</b> button on the <b>Certification</b> 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	<ul style="list-style-type: none"> <li>On the <b>Exemption Info (P.2)</b> page, question #5: <b>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)?</b></li> <li>On the <b>Exemption Info (P.2)</b> page, question #6: <b>Is this property used as low-income housing?</b></li> <li>On the <b>Exemption Info (P.2)</b> page, question #7: <b>Is this property used as a housing for the elderly or handicapped?</b></li> <li>On the <b>Exemption Info (P.2)</b> page, question #8: <b>Do other persons or organizations use any of this property?</b></li> <li>On the <b>Exemption Info (P.2)</b> page, question #9: <b>Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code?</b></li> <li>On the <b>Exemption Info (P.2)</b> page, question #10: <b>Have the organization's income and/or expenses increased by more than 25 percent since last year?</b></li> </ul>
3	BOE-267- Welfare Exemption (First Filing)	Instructions Filing Info Property Identification Property Type(s) Use of Property Exemption Info Contact Info Certification	<p>The <b>Submit</b> button on the <b>Certification</b> page does not appear if these conditions are not met:</p> <ul style="list-style-type: none"> <li>On the <b>Filing Info</b> page, question: <b>Filed For OCC With The Board?</b></li> </ul> <p>Please refer to the <b>Instructions</b> page to see all requirements for this exemption.</p>
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 <b>Instructions</b> 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 <b>Submit</b> button on the <b>Certification</b> page does not appear if these conditions are not met: <ul style="list-style-type: none"> <li>On the <b>Church Info (P.1)</b> page, question #6: <b>School or Day Care Operated at this Location?</b></li> <li>On the <b>Church Info (P.2)</b> page, question #9: <b>Are bingo games being operated on this property?</b></li> <li>On the <b>Church Info (P.2)</b> page, question #10: <b>Is any portion of this property being used for living quarters for any person?</b></li> </ul>
7	BOE-264-AH - College Exemption	Filing Info Addresses Property Info (P.1) Property Info (P.2) Attachments Certification	Please refer to the <b>Instructions</b> page to see all requirements for this exemption

- 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

INSTRUCTIONS FOR FILING A CLAIM FOR RELIGIOUS EXEMPTION FROM PROPERTY TAX

**BOE-267-S: RELIGIOUS EXEMPTION**

This affidavit is required under the provisions of sections 206.1, 207, 207.1, 214.4, 251, 255, 257, 257.1, 260, 270, and 271 of the Revenue and Taxation Code.

**GENERAL INFORMATION**

The Religious Exemption may be claimed on property owned by a religious organization and used exclusively for religious purposes. This includes religious worship and school purposes, including preschools, nursery schools, kindergartens, schools of less than collegiate grade, or schools of collegiate grade and less than collegiate grade. The exemption is also available if another church uses the property part time for religious worship and operates a school, provided that the owner church continues to conduct worship services on the property. Property used for school purposes only, where there are no church services, does not qualify for the Religious Exemption but may qualify for the Welfare Exemption.

The law provides for one-time filing for the Religious Exemption by the claimant and the annual mailing of a termination notice by the Assessor. Penalties for failure to terminate the exemption when no longer eligible are also a part of the law.

**FILING OF AFFIDAVIT**

To receive the full exemption, this form must be filed with the Assessor by February 15. (Section 270 provides a partial exemption for late filing of the Religious Exemption.) Once granted, the exemption remains in effect until terminated.

**IDENTIFICATION OF APPLICANT**

Identify the corporate or organization name of the church seeking exemption on the property. Include the mailing address, website address (if any), and corporate identification number (if any).

**IDENTIFICATION OF PROPERTY**

Identify the location of the property for which you are seeking exemption. A separate claim form must be filed for each location.

**USE OF PROPERTY**

Please answer all questions in this section of the claim form.

Please note that there are three exemptions that may be claimed on church property: the Church Exemption, the Religious Exemption, and the Welfare Exemption. If it does not appear that your organization qualifies under the Religious Exemption, please contact the Assessor.

The Church Exemption may be claimed on property that is owned, leased, or rented by a religious organization and **used exclusively for religious worship services**. The Church Exemption is the most restrictive of the three exemptions available to a church since the organization's property must be used solely for religious worship and other activities reasonably necessary for the accomplishment of the church's religious purposes. The welfare exemption may be claimed on property that is used for other than religious worship and schools, such as housing for clergy, bingo, a convent or a retreat, summer camp, or if the church property is used regularly by a charitable organization.

Save Print 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.

The screenshot displays the 'FILING YEARS' section of the 'BOE-267-S: RELIGIOUS EXEMPTION' form. At the top, a progress bar shows the current step. Below the progress bar, the text reads 'This claim is filed for fiscal year 20\_\_ - 20\_\_.'. The form title 'BOE-267-S: RELIGIOUS EXEMPTION' is centered. An example sentence is provided: '(Example: a person filing a timely claim in January 2011 would enter "2011" in Claim Fiscal Year From and "2012" in Claim Fiscal Year To)'. Two input fields are present: '\* Claim Fiscal Year From' with the value '2020' and '\* Claim Fiscal Year To' with the value '2021'. At the bottom left, there are 'Save' and 'Print PDF' buttons. At the bottom right, there are 'Previous' and 'Next' buttons. A red callout box points to the progress bar with the text 'Form completion status bar'.

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: RELIGIOUS EXEMPTION**

Identification of Applicant

\* Corporate or Organization Name of Church

Local Church Name

Corporate ID (If Any)

Website Address (If Any)

Mailing Address

Mailing Care Of

\* Mailing Street Number

Mailing Street Fraction

Mailing Street Pre-Direction

\* Mailing Street Name

\* Mailing Street Type

Mailing Unit Type

Mailing Unit Number

\* Mailing City

\* Mailing State

\* Mailing Postal Code

Mailing Postal Code Extension

\* Mailing Country

 Save  

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

<b>Care Of</b> <input type="text"/>	<b>* Street Number</b> <input type="text" value="██████"/>
<b>Street Fraction</b> <input type="text" value="--None--"/>	<b>Street Direction</b> <input type="text" value="--None--"/>
<b>* Street Name</b> <input type="text" value="██████"/>	<b>* Street Type</b> <input type="text" value="Street"/>
<b>Unit Type</b> <input type="text" value="--None--"/>	<b>Unit Number</b> <input type="text"/>
<b>* City</b> <input type="text" value="San Francisco"/>	<b>* State</b> <input type="text" value="California"/>
<b>* Zip Code</b> <input type="text" value="██████"/>	<b>Zip Extension</b> <input type="text"/>
<b>Assessor's Parcel Number</b> <input type="text"/>	

Identification of Property

**BPP Account Number**

**\* 1. Is this real property owned by the church?**

**\* If Yes, Enter the Date the Property was Acquired**

**\* Enter date first used for Church/School Purposes**

2a. The property is owned by an entity organized and operating exclusively for religious purposes.\*

2b. The entity is a nonprofit organization\*

2c. No part of the net earnings inures to the benefit of any private individual.\*

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, equipment, and land claimed used exclusively for religious purposes?

Yes

4. Is there any portion of the property currently under construction?

No

5. Has any new construction been completed on this property since January 1, 12:01 a.m. last year?

No

6. Does the real property include property used for parking purposes?

Yes

If Yes, is all real property owned by or leased to the church, upon which exemption is claimed for parking purposes, necessarily and reasonably required for parking of automobiles of persons attending or engaged in religious worship or religious activity, and which is not at other times used for commercial purposes?

Yes

Note: Commercial purposes does not include the parking of vehicles or bicycles, the revenue of which does not exceed the ordinary and necessary costs of operating and maintaining the property for parking purposes.

7. Is there a sanctuary (church) on or adjacent to this property?

Yes

If No, a claim for Welfare Exemption must be filed with the Assessor by February 15 each year for the property or portion of the property.

Select, as applicable, the type(s) of schools being operated on this property.

**School Type(s)**

Breschool  
Nursery school  
Kindergarten  
Elementary

In order to chose multiple selections please hold down ctrl (windows) or command (mac) and click on the relevant options.

9. Are bingo games being operated on this property?

Yes

If Yes, a claim for Welfare Exemption must be filed with the Assessor by February 15 each year for the property or portion of the property.

10. Is any equipment or other property at this location being leased or rented from someone else?

No

If Yes, list in the remarks section the name and address of the owner, and the type, make, model, and serial number of the property. Note: Leased personal property is eligible for the Religious Exemption if the personal property is used exclusively for religious purposes.

11. Is any portion of this property used for living quarters for any person?

No

12. Is any portion of this property vacant and/or unused?

No

13. Is any portion of this property being rented to, leased to, used and/or operated by a person or organization other than the claimant?

No

14. Has there been any change in the use of this property since 12:01 a.m., January 1 of last year?

No

Remarks.

Save Print PDF

Previous Next

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

INSTRUCTIONS FILING YEARS APPLICANT INFO PROPERTY INFO USE OF PROPERTY **CONTACT INFO** CERTIFICATION

**BOE-267-S: RELIGIOUS EXEMPTION**

Whom should we contact during normal business hours for additional information?

\* Name

\* Title

Daytime Telephone

\* 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.

INSTRUCTIONS FILING YEARS APPLICANT INFO PROPERTY INFO USE OF PROPERTY CONTACT INFO **CERTIFICATION**

**BOE-267-S: RELIGIOUS EXEMPTION**

Certification

\* Claimant Name - First

Claimant Name - Middle

\* Claimant Name - Last

Name of Person Making Claim

\* Claimant Title

\* Signature

Signature Date

The Signature Date will be populated upon submission.

*I certify (or declare) under penalty of perjury under the 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.*

THIS 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.

INSTRUCTIONS FILING YEARS APPLICANT INFO PROPERTY INFO USE OF PROPERTY CONTACT INFO **CERTIFICATION**

**BOE-267-S: RELIGIOUS EXEMPTION**

Certification

\* Claimant Name - First [Redacted] Claimant Name - Middle [Redacted]

\* Claimant Name - Last [Redacted] \* Claimant Title [Owner]

Name of Person Making Claim

\* Signature [Redacted] Signature Date [Redacted]

The Signature Date will be populated upon submission.

*I certify (or declare) under penalty of perjury under the 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.*


THIS STATEMENT IS SUBJECT TO AUDIT

Form Submission

Once you have filled out all the required information in each section, you will be able to submit this form.

[Save](#) [Print PDF](#) [Submit](#) [Previous](#)

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.



**Certification Complete**

Thank you for electronically filing. Listed below is your confirmation number.

Statement Type: BOE-267-S - Religious Exemption  
Property Id: [Redacted]  
Confirmation Number: [Redacted]  
Date of Submission: 11/22/2021 10:12 AM

You may view your e-Filed statement by clicking "View Statement" below.

[Home](#) [Print](#) [View Statement](#)

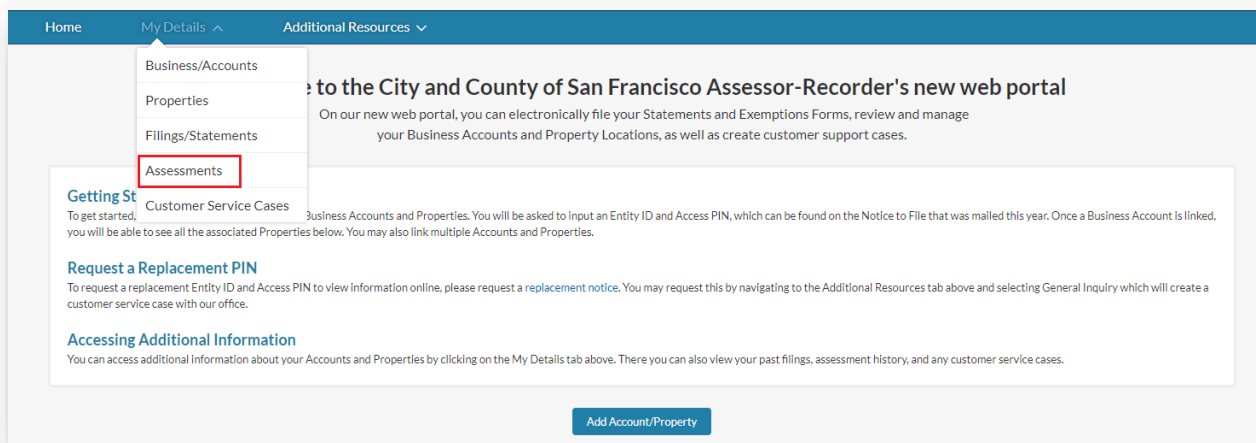
15. The Taxpayer receives an email informing them of their filing along with details related to the statement.



## 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.



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

Home My Details Additional Resources

If your Assessment is in 'Noticing' Sub-Status & you have questions about it, please contact us before enrollment. You also have the ability to waive your notice period if you'd like to receive your Assessment sooner by clicking into the Assessment Case Number below and navigating to the 'Waive Notice Period' tab.

To Print the Details of the Assessment, click the "Print Assessment Details" button and select the assessments

[Print Assessment Details](#)

Cases  
My Assessments

6 items • Sorted by Case Number • Filtered by All cases - 5 more filters applied • Updated a few seconds ago

Case Number ↑	Assessment Year	Property	Sub-Status
1 01415617	2021	[REDACTED]	Completed
2 01424559	2020	[REDACTED]	Completed
3 01424561	2021	[REDACTED]	Completed
4 01480849	2021	[REDACTED]	Completed
5 01480850	2020	[REDACTED]	Completed
6 01480868	2020	[REDACTED]	Noticing

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

Print Assessment Selection Menu

3 item(s) Selected

Case Number	Assessment Year	Property	Sub Status
+ 01415617	2021	[REDACTED]	Completed <input type="checkbox"/>
+ 01424559	2020	[REDACTED]	Completed <input type="checkbox"/>
+ 01424561	2021	[REDACTED]	Completed <input type="checkbox"/>
+ 01480849	2021	[REDACTED]	Completed <input type="checkbox"/>
+ 01480850	2020	[REDACTED]	Completed <input type="checkbox"/>
+ 01480868	2020	[REDACTED]	Noticing <input type="checkbox"/>

Cancel Finish

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



JOAQUIN TORRES  
ASSESSOR-RECORDER

SAN FRANCISCO  
OFFICE OF THE ASSESSOR-RECORDER

VALUATION REPORT

Status: Final

Entity ID	Assessment Number	Property Id	Property Name	Processed Date
				9/30/2021

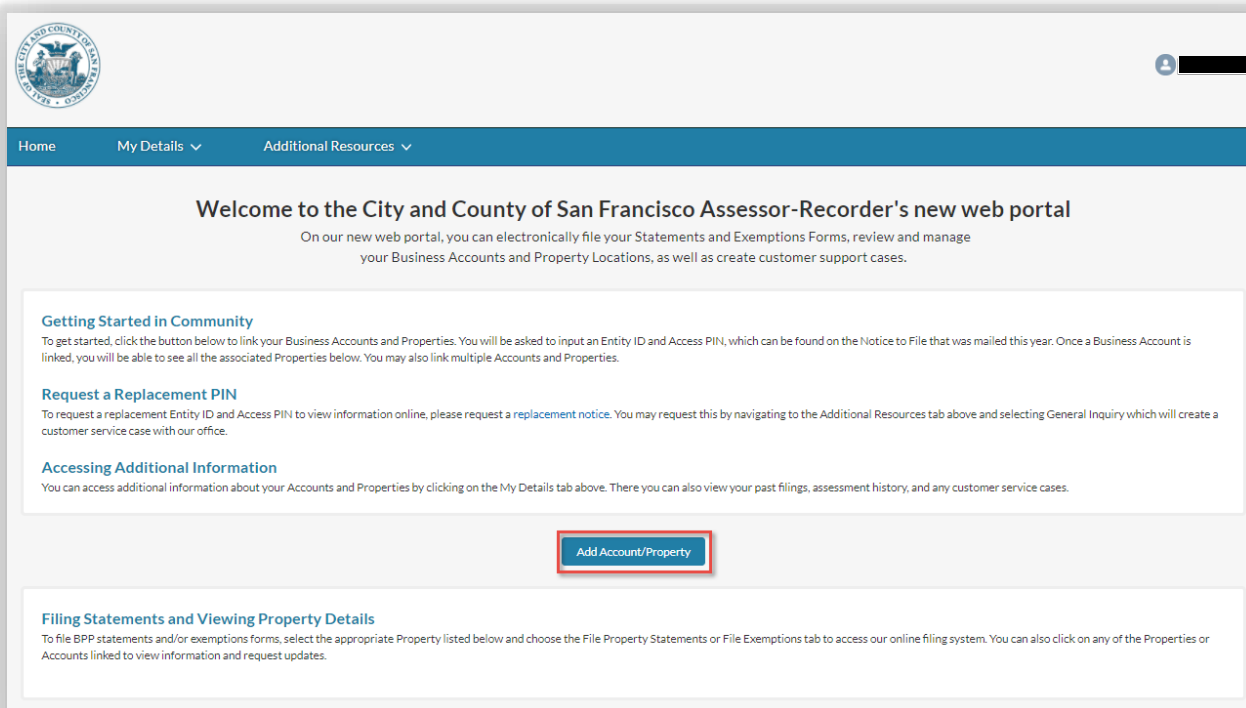
Assessment Year: 2021

Asset Classification	Year Life	% Fixture	Acquisition Year	Adjusted Cost	Depreciation Factor	Fixtures Values	PP value	Total Market Value
Leasehold Improvements - Structure	NA	100	2019	13,180	101	13,317	0	13,317
			<b>Sub Total</b>	<b>13,180</b>		<b>13,317</b>	<b>0</b>	<b>13,317</b>
Machinery & Equipment	15	50	2019	20,081	90	9,037	9,036	18,073
			<b>Sub Total</b>	<b>20,081</b>		<b>9,037</b>	<b>9,036</b>	<b>18,073</b>
Office Furniture & Equipment	12	0	2019	5,000	86	0	4,300	4,300
			<b>Sub Total</b>	<b>5,000</b>		<b>0</b>	<b>4,300</b>	<b>4,300</b>
Supplies	99	0	2019	500		0	500	500
			<b>Sub Total</b>	<b>500</b>		<b>0</b>	<b>500</b>	<b>500</b>

## 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.



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.

ASSESSOR-RECORDER



SAN FRANCISCO  
OFFICE OF THE ASSESSOR-RECORDER

\* [REDACTED] \*

**Info to log into the San Francisco E-File Portal:**

Entity ID #: [REDACTED]  
PIN #: [REDACTED]

Filing Due Date: April 1, 2021

Last Day To File Without Penalty: May 7, 2021

**NOTICE OF REQUIREMENT TO FILE  
2021 BUSINESS PROPERTY STATEMENT**

February 12, 2021

Dear Business Owner:

This Notice informs you of your business personal property filing obligations for 2021. **Your business is being required by the assessor to file for 2021.** State law requires business owners to file the Business Property Statement annually with the County Assessor for every business located within the County (R & T Code, Sec. 441(a)). The last day to file without incurring a penalty is **May 7, 2021**; penalty for filing after May 7<sup>th</sup> is 10% of total assessed value. **The Office of Treasurer & Tax Collector will mail tax bills for unsecured property to taxpayers by July 2021, and payments will be due by August 31, 2021.**

Link your ASR Account and Vessel Properties here

Entity ID ⓘ  
123456

Access PIN  
.....

Submit

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



Success!  
Found your business/account: [REDACTED]



Home 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.

### Getting Started in Community

To get started, click the button below 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 linked, you will be able to see all the associated Properties below. You may also link multiple Accounts and Properties.

### Request a Replacement PIN

To request a replacement Entity ID and 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 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 above. There you can also view your past filings, assessment history, and any customer service cases.

Add Account/Property

### Filing Statements and Viewing Property Details

To file BPP statements and/or exemptions 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 Accounts linked to view information and request updates.

Properties Accounts/Businesses

#### My Properties

1 Item • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated 27 minutes ago

Property Name ↑	Status	Account Name
[REDACTED]	Active	[REDACTED]

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[Add Account/Property](#)

**Filing Statements and Viewing Property Details**  
 To file BPP statements and/or exemptions 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 Accounts linked to view information and request updates.

Properties **Accounts/Businesses**

Accounts  
**My Accounts**

2 Items • Sorted by Account Name • Filtered by All accounts - Is Current User's Community Account • Updated a few seconds ago

	Account Name ↑	Entity ID	Phone
1	[REDACTED]	[REDACTED]	
2	[REDACTED]	[REDACTED]	

## 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.

Home 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.

**Getting Started in Community**  
To get started, click the button below 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 linked, you will be able to see all the associated Properties below. You may also link multiple Accounts and Properties.

**Request a Replacement PIN**  
To request a replacement Entity ID and 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 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 above. There you can also view your past filings, assessment history, and any customer service cases.

[Add Account/Property](#)

**Filing Statements and Viewing Property Details**  
To file BPP statements and/or exemptions 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 Accounts linked to view information and request updates.

Properties **Accounts/Businesses**

Accounts  
**My Accounts**

2 Items • Sorted by Account Name • Filtered by All accounts - Is Current User's Community Account • Updated a few seconds ago

	Account Name ↑	Entity ID	Phone
1	[REDACTED]	[REDACTED]	
2	[REDACTED]	[REDACTED]	

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

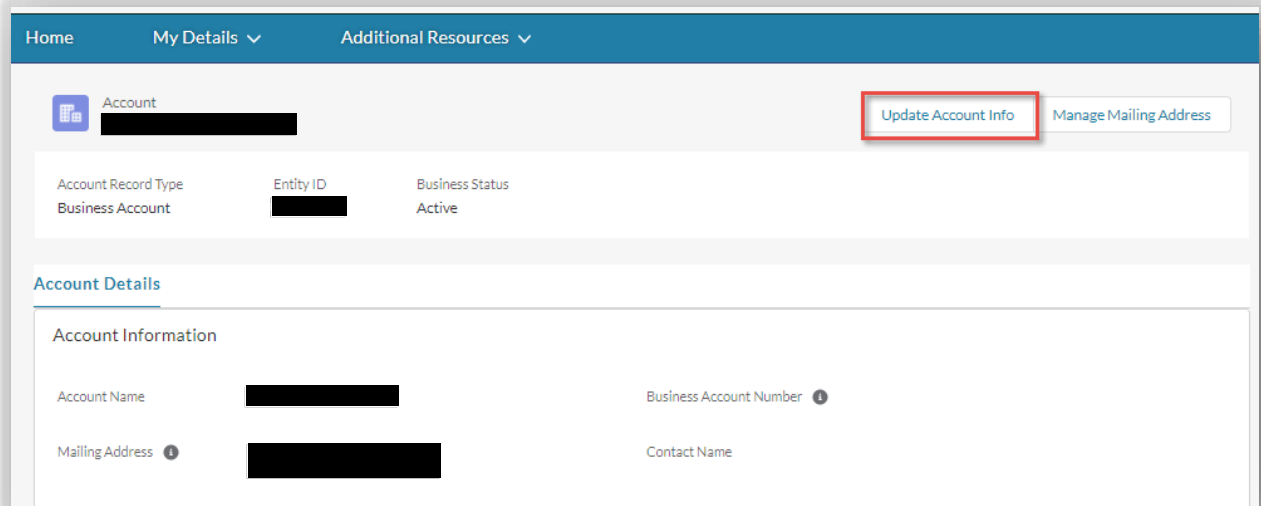
Properties **Accounts/Businesses**

Accounts  
**My Accounts**

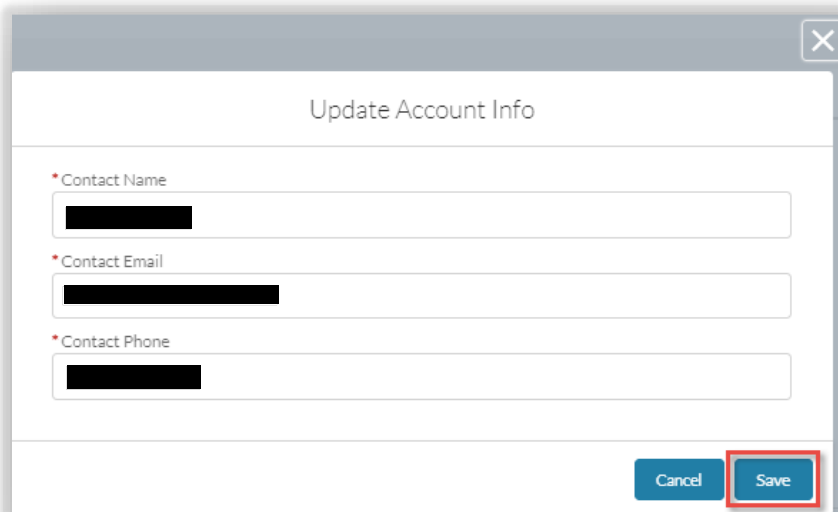
2 Items • Sorted by Account Name • Filtered by All accounts - Is Current User's Community Account • Updated a few seconds ago

	Account Name ↑	Entity ID	Phone
1	[REDACTED]	[REDACTED]	
2	[REDACTED]	[REDACTED]	

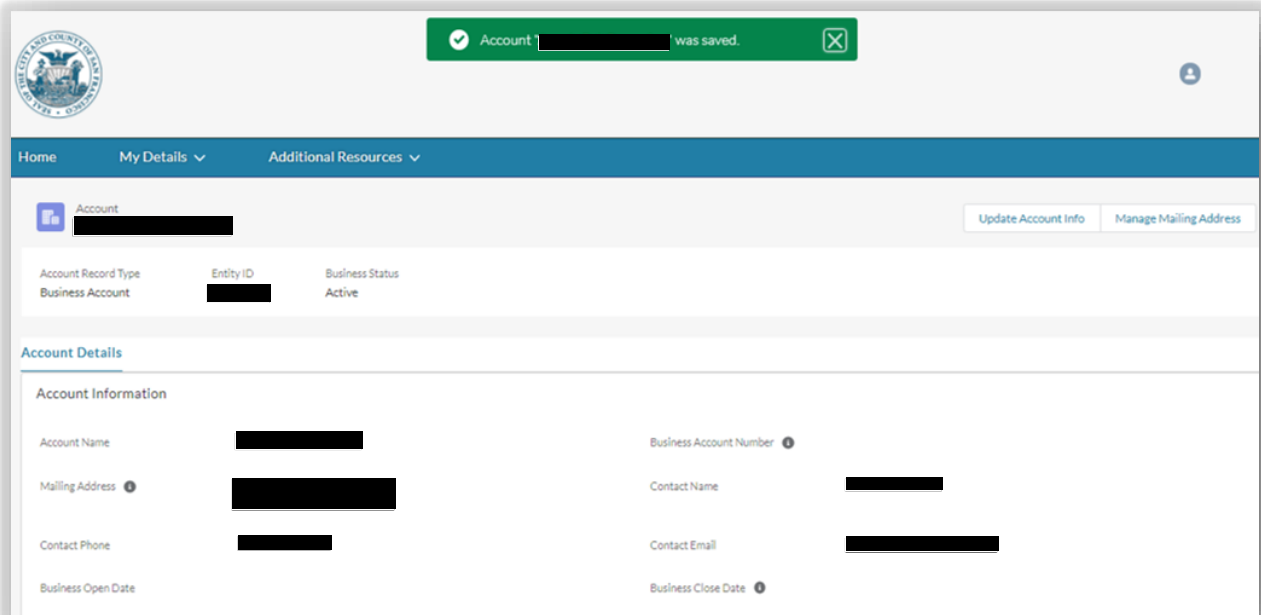
3. The Taxpayer clicks the **Update Account Info** button to update relevant information.



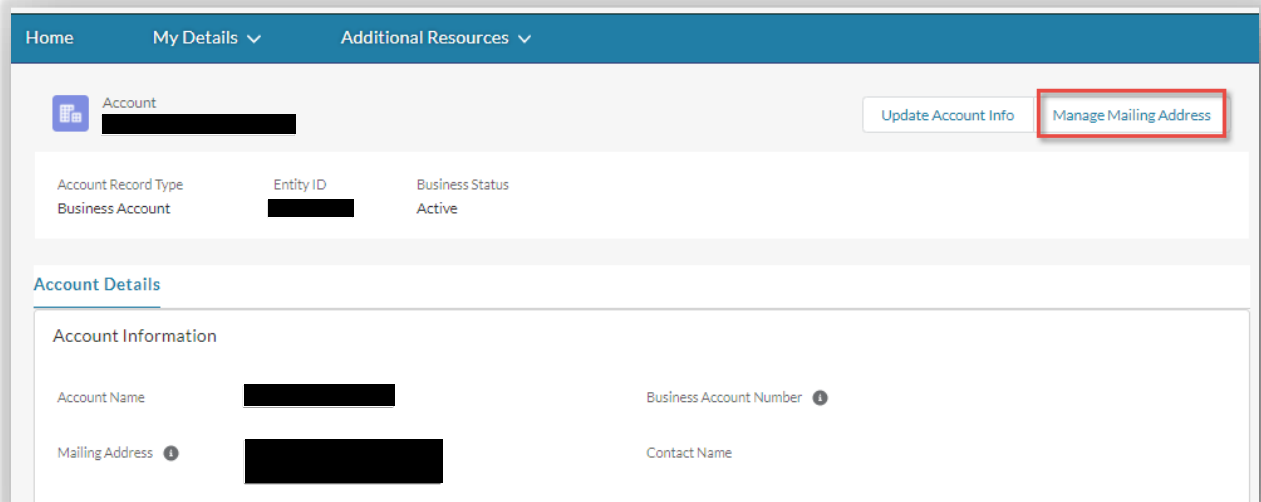
4. In Update Account Info, the Taxpayer can provide updated information and click the **Save** button.



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



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



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.



Manage Mailing Address

350 Bush St

\* Zip Code  
94107

Q Validate with USPS X Clear Search

USPS Result  
350 BUSH ST  
SAN FRANCISCO, US-CA 94104 - 2804

Use This Information X Clear Validation Result

Care Of  
[REDACTED]

Street Number Street Fraction  
350 --None--

Street Direction Street Name Street Type  
--None-- Bush Street

Unit Type Unit Number  
--None--

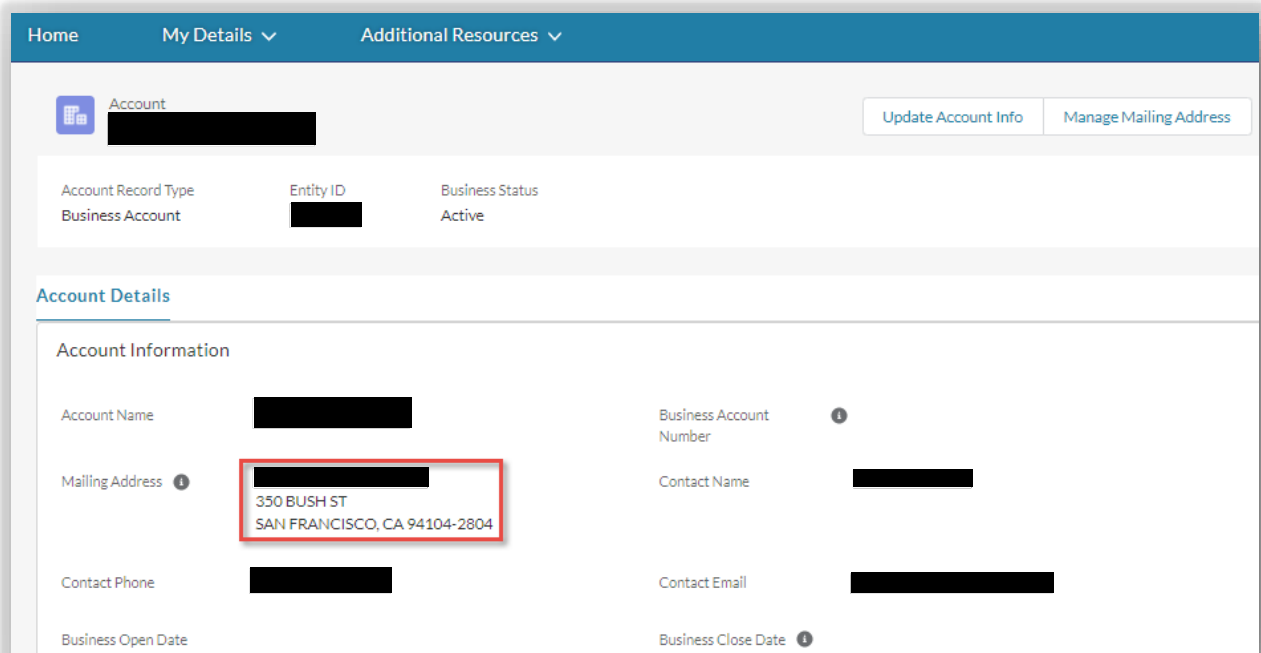
City State Zip Code  
San Francisco California 94107

Zip Extension  
[REDACTED] Lookup City & State

Save Clear

Cancel

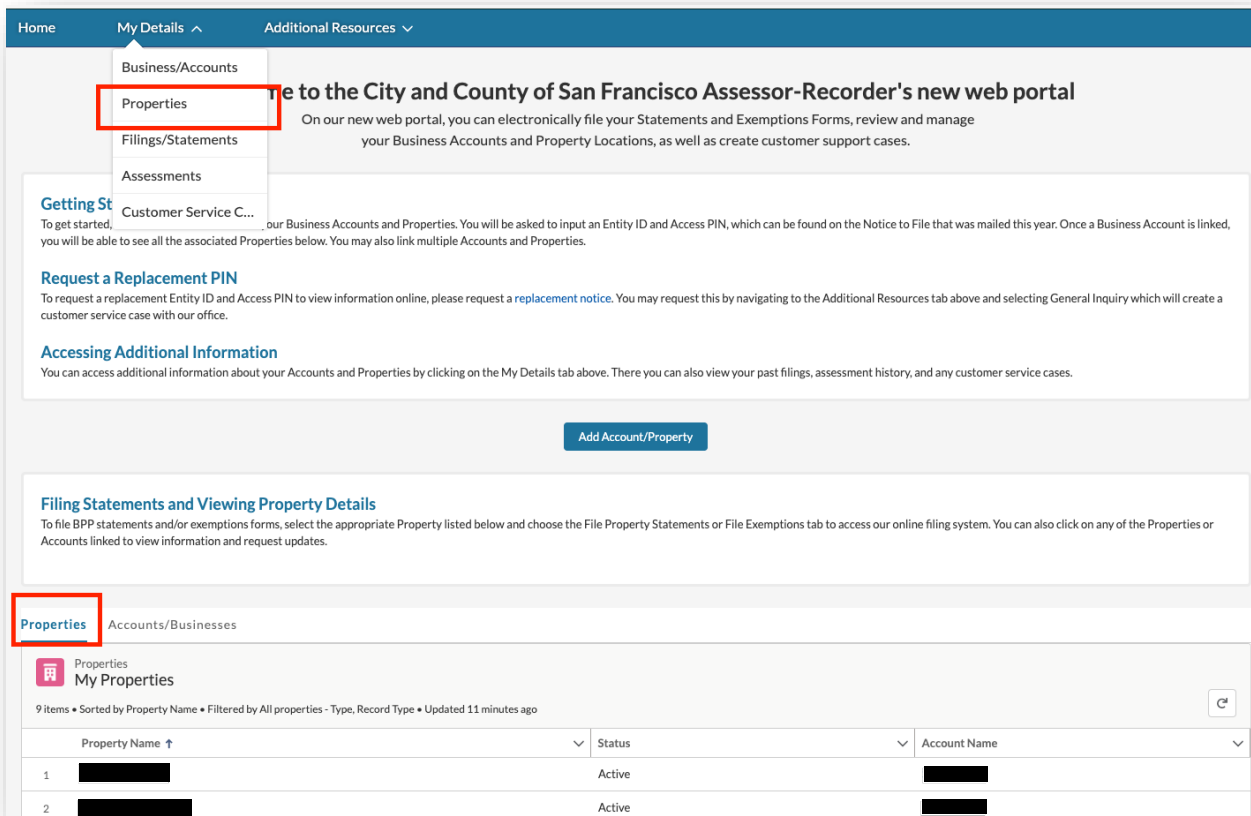
8. The updated information is reflected on the Community Portal.



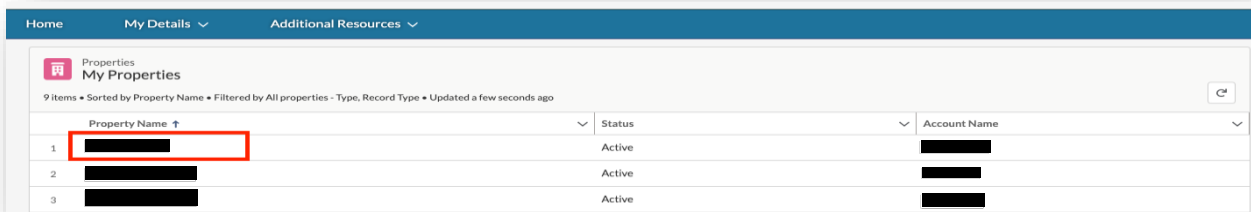
## Requesting Property Updates

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.



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



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

Property [REDACTED]

Record Type: Business Personal Property

Type: [REDACTED]

Account Name: [REDACTED]

Entity Id: [REDACTED]

Doing Business As: [REDACTED]

Property ID: [REDACTED]

File Property Statements | File Exemptions | Details & Related | **Request Property Updates**

Please select a reason from the following list

\* Update Reason  
 Moved - outside of San Francisco

Note: To update an already submitted statement, click on 'Amend Your Filing' button on the statement. If you have not already submitted a statement this year and would like to file your statement, please go to File Property Statements tab on the Property.

Next

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

Property [REDACTED]

Record Type: Business Personal Property

Type: [REDACTED]

Account Name: [REDACTED]

Entity Id: [REDACTED]

Doing Business As: [REDACTED]

Property ID: [REDACTED]

File Property Statements | File Exemptions | Details & Related | **Request Property Updates**

Please select a reason from the following list

\* Update Reason  
 ✓ Moved - outside of San Francisco  
 Moved - within San Francisco  
 Business Closed  
 Sold  
 Other Information  
 Report Duplicate Business/Multiple Notices Received

Note: To update an already submitted statement, click on 'Amend Your Filing' button on the statement. If you have not already submitted a statement this year and would like to file your statement, please go to File Property Statements tab on the Property.

Next

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.

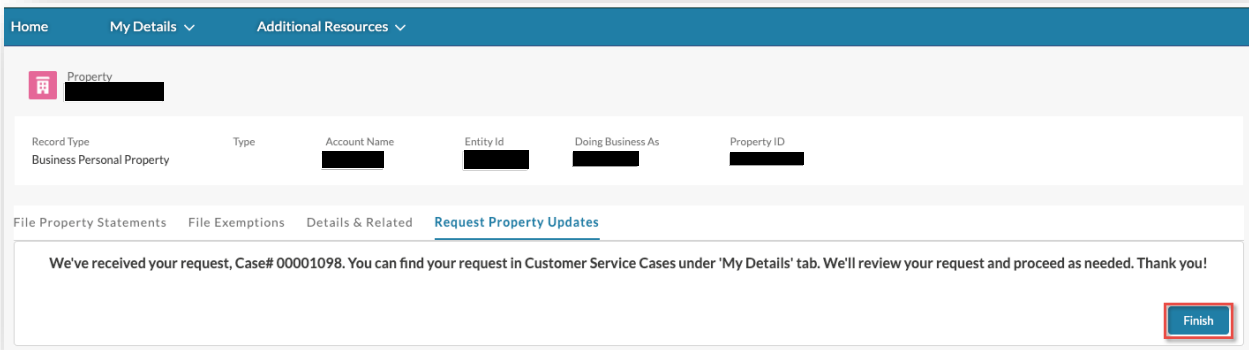
The following information is needed based on the type of action the Taxpayer takes:

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

Update Reason	Information Needed	Mandatory Information
	Lease Termination Date	Conditional - required if <b>Lease Terminated?</b> is Yes
	New Business Location Address (Situs)	Yes
Other Information	Subject	Yes
	Description	No
Sold	Date Business Sold	Yes
	New Owner/Entity	No
	Lease Terminated?	Yes
	Lease Termination Date	Conditional - required if <b>Lease Terminated?</b> 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.

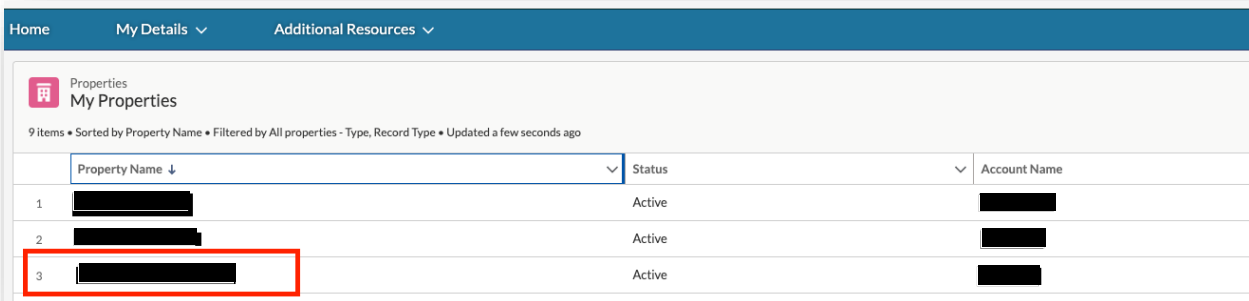
7. The Taxpayer receives a message with the **Case** number upon submission. The user clicks the **Finish** button to close the message.



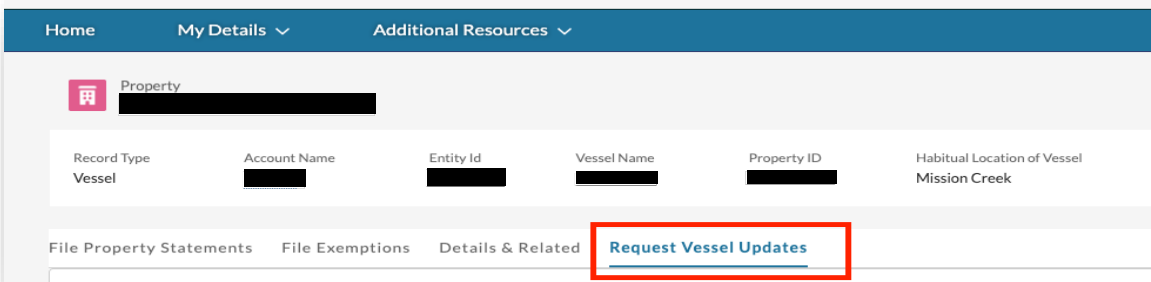
## Requesting Vessel Updates

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.



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



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

Property [REDACTED]

Record Type: Business Personal Property

Type: [REDACTED]

Account Name: [REDACTED]

Entity Id: [REDACTED]

Doing Business As: [REDACTED]

Property ID: [REDACTED]

File Property Statements | File Exemptions | Details & Related | **Request Property Updates**

Please select a reason from the following list

\* Update Reason

- ✓ Moved – outside of San Francisco
- Moved – within San Francisco
- Business Closed
- Sold
- Other Information
- Report Duplicate Business/Multiple Notices Received

no already submitted a statement this year and would like to file your statement, please go to File Property

Next

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.

File Property Statements | File Exemptions | Details & Related | **Request Vessel Updates**

You have reported your Vessel Moved Outside of San Francisco:

Please provide the following information...

\* Date Moved  
Sep 22, 2020

\* Moved To  
Yacht Haven Marina, LA

Previous Next

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

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



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

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

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

## 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.

Home My Details Additional Resources

Properties  
My Properties

9 items • Sorted by Property Name • Filtered by All properties - Type, Record Type • Updated a few seconds ago

	Property Name ↓	Status	Account Name
1	[REDACTED]	Active	[REDACTED]
2	[REDACTED]	Active	[REDACTED]
3	[REDACTED]	Active	[REDACTED]

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

Home My Details Additional Resources

Property [REDACTED]

Record Type: Business Personal Property    Type: [REDACTED]    Account Name: [REDACTED]    Entity Id: [REDACTED]    Doing Business As: [REDACTED]    Property ID: [REDACTED]

**File Property Statements**    File Exemptions    Details & Related    Request Property Updates

San Francisco Assessor Recorder

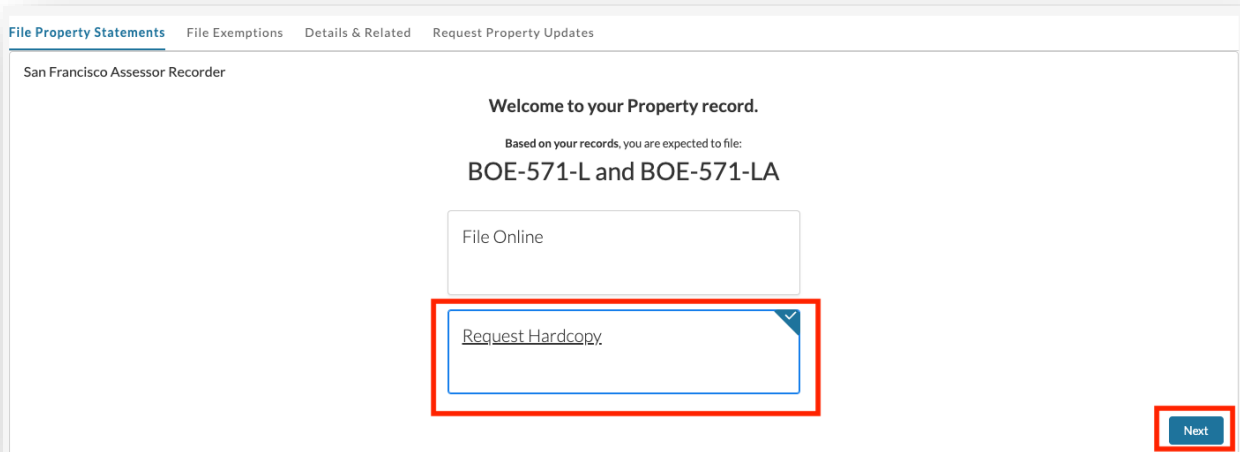
**Welcome to your Property record.**

Based on your records, you are expected to file:  
**BOE-571-L and BOE-571-LA**

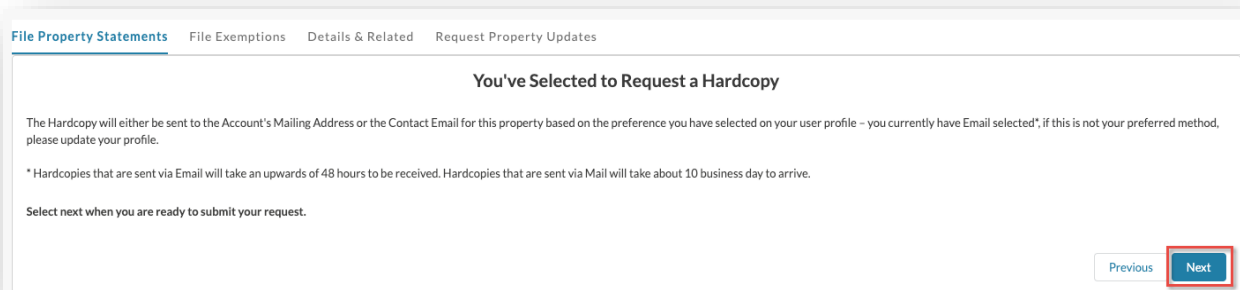
File Online

Request Hardcopy

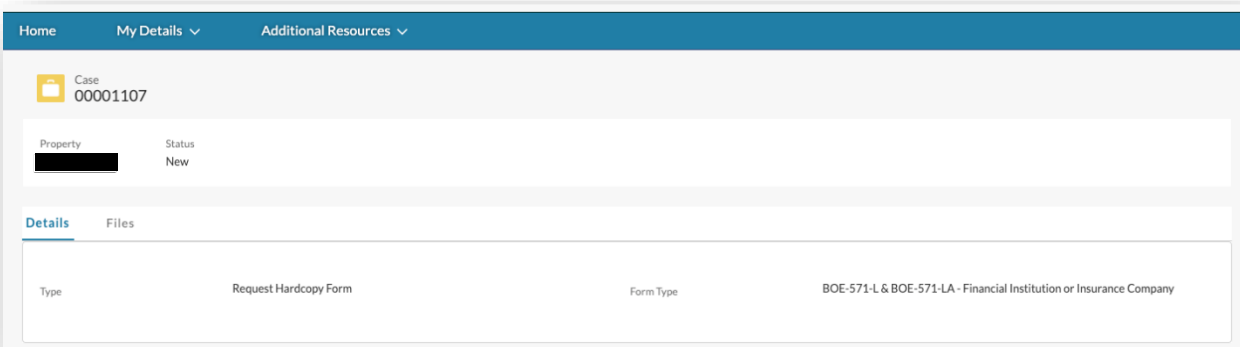
Next



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



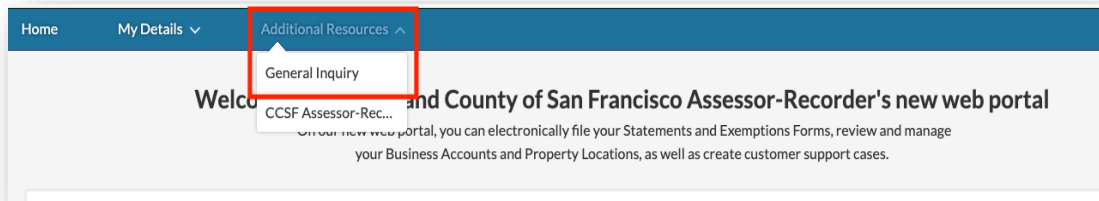
5. Upon completion, the Taxpayer is routed to the **Case** details, which displays that the request has been made.



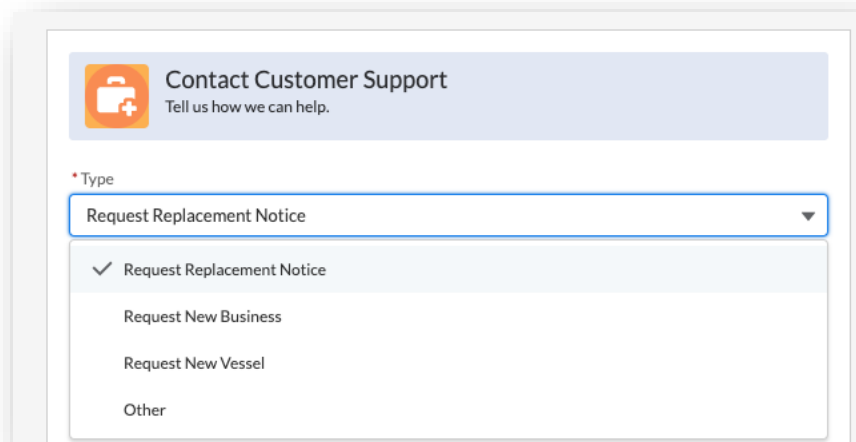
## Creating a New Customer Case

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.



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



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

Type	Information Needed	Mandatory Information
Request Replacement Notice	Account Name	Yes
	Doing Business As	Yes
Request New Business	Business Owner	Yes

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

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

**Contact Customer Support**  
Tell us how we can help.

\* Type  
Request Replacement Notice

Upload File  
Upload Files Or drop files

File Name:

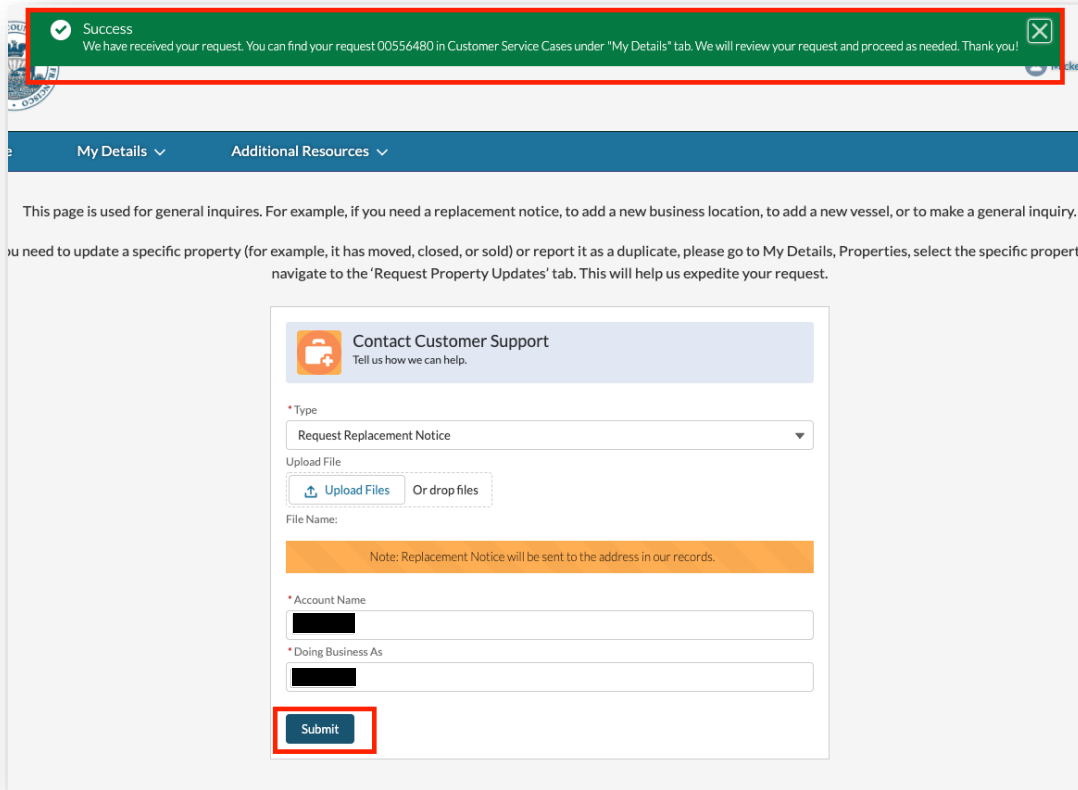
Note: Replacement Notice will be sent to the address in our records.

\* Account Name  
[Redacted]

\* Doing Business As  
[Redacted]

Submit

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

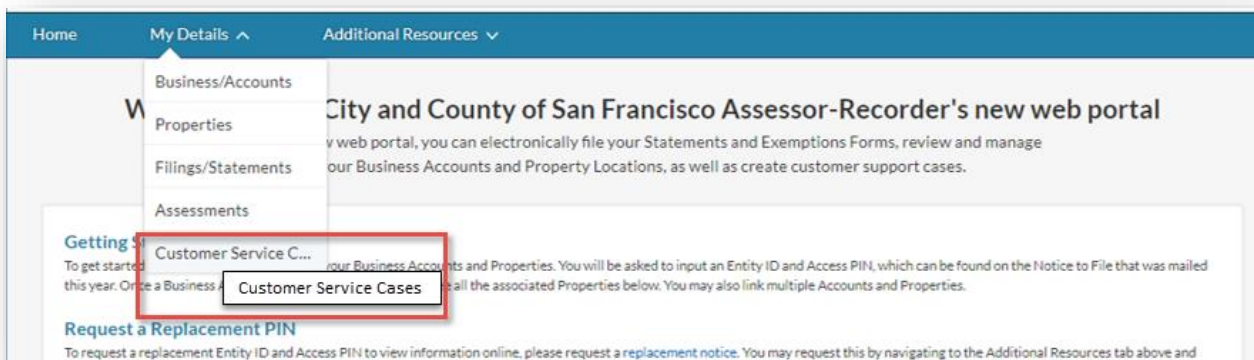


## Viewing and Tracking Existing Customer Case

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.



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

Home My Details Additional Resources

Cases  
My Customer Service Cases

50+ items • Sorted by Case Number • Filtered by All cases - Case Record Type • Updated a minute ago

	Case Number ↓	Status	Property	Type	Sub-Type
1	00001109	New	[REDACTED]	Request Hardcopy Form	
2	00001108	New	[REDACTED]	Request Hardcopy Form	
3	00001107	New	[REDACTED]	Request Hardcopy Form	

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

Home My Details Additional Resources

Cases  
My Customer Service Cases

50+ items • Sorted by Case Number • Filtered by All cases - Case Record Type • Updated a minute ago

	Case Number ↓	Status	Property	Type	Sub-Type
1	00001109	New	[REDACTED]	Request Hardcopy Form	
2	00001108	New	[REDACTED]	Request Hardcopy Form	
3	00001107	New	[REDACTED]	Request Hardcopy Form	

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

Case  
00001108

Property [REDACTED] Status New

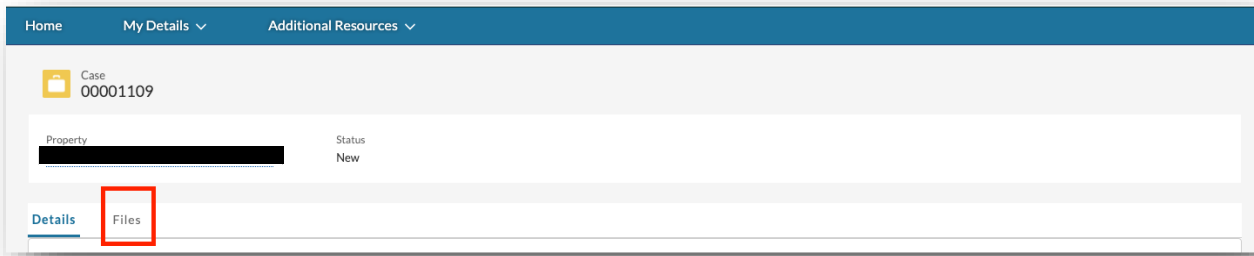
Details Files

Type	Request Hardcopy Form	Form Type	BOE-571-L & BOE-571-LA - Financial Institution or Insurance Company
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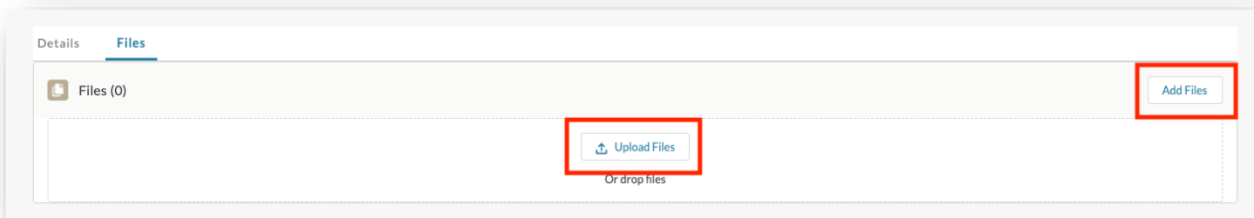
## Uploading a File/Document to a Case

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

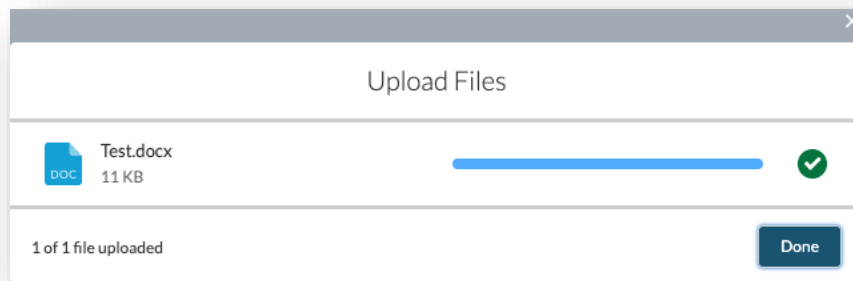
1. The Taxpayer can navigate to a specific **Case** and click the **Files** tab.



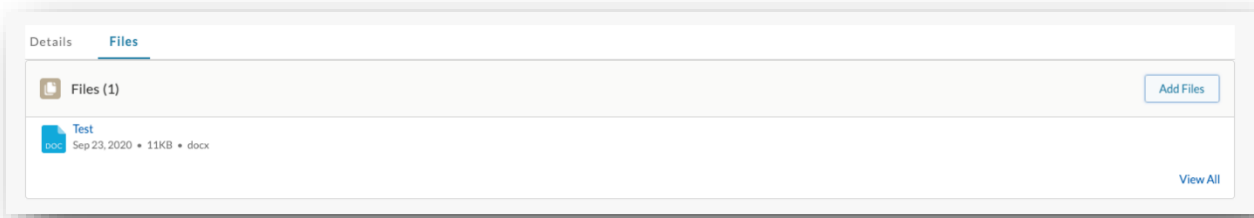
2. The Taxpayer can click the **Upload Files** or **Add Files** button to upload a document/file.



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.



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

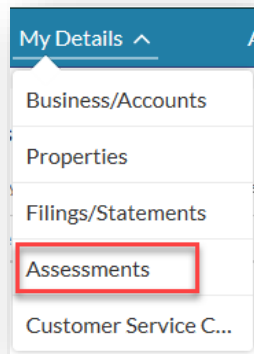


## Waiving Noticing Period for Assessments

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.

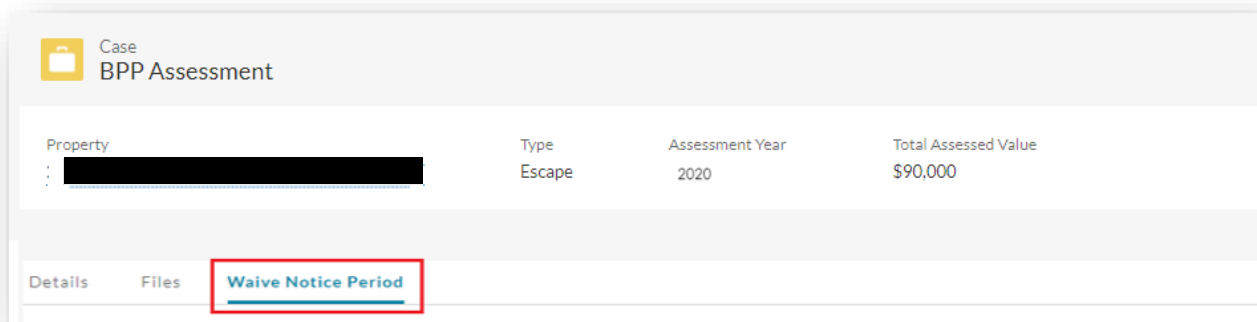


2. The Taxpayer clicks an assessment **Case Number** for which the noticing period needs to be waived.

A screenshot of a web application showing a table of 'My Assessments'. The table has five columns: 'Case Number', 'Assessment Year', 'Property', and 'Sub-Status'. The first four rows show assessments with a 'Completed' status. The fifth row, with Case Number '02236833', has a 'Noticing' status. Both the Case Number and the 'Noticing' status are highlighted with red rectangular boxes.

	Case Number ↑	Assessment Year	Property	Sub-Status
1	00578031	2019	[REDACTED]	Completed
2	00578043	2020	[REDACTED]	Completed
3	00607724	2020	[REDACTED]	Completed
4	02236832	2020	[REDACTED]	Completed
5	02236833	2020	[REDACTED]	Noticing

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



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

Case  
BPP Assessment

Property :	█	Type Escape	Assessment Year 2020	Total Assessed Value \$90,000
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Details Files Waive Notice Period

ESCAPE WAIVER FORM

I waive all my rights and privileges under Section 531.8 of the California R&T Code, which states "No escape assessment shall be enrolled under this article before 15 days after the Assessor has mailed or otherwise delivered to the affected taxpayer a "Notice of Proposed Escape Assessment" with respect to one of more specified tax years." Please issue escape assessment(s) and tax bill(s) immediately.

Name  
█

Confirm

5. The SMART system displays a Success message.

Case  
BPP Assessment

Success  
This has been submitted successfully

Property :	█	Type Escape	Assessment Year 2020	Total Assessed Value \$90,000
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Details Files Waive Notice Period

ESCAPE WAIVER FORM

I waive all my rights and privileges under Section 531.8 of the California R&T Code, which states "No escape assessment shall be enrolled under this article before 15 days after the Assessor has mailed or otherwise delivered to the affected taxpayer a "Notice of Proposed Escape Assessment" with respect to one of more specified tax years." Please issue escape assessment(s) and tax bill(s) immediately.

Name  
█

Confirm