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GENERAL PLANNING CONSULTANT:

TECHNICAL MANUAL 88.4.1

NOTES AND DIRECTIONS FOR PREPARING NOTICES

FOR CORRECTING BENEFIT ASSESSMENTS AND

CLOSING APPEALS CASE FILES

=====

Prepared for:

Southern California Rapid Transit District

Prepared By:

Schimpeler Corradino Associates  
Myra L. Frank & Associates

in association with

Cordoba Corporation  
Manuel Padron & Associates  
The Planning Group, Inc.

January, 1988

**MTA LIBRARY**

NOTE TO USERS

All forms and letters have been developed to comply and coordinate with the administrative requirements of the various outside agencies and the SCRTD Departments involved in the Metro Rail MOS-1 Benefit Assessment Districts. Thus, they may need revision through the annual cycle or as agency policies and procedures change.

Accordingly, it is prudent to review forms and letters periodically when in continual use or prior to reactivation when use has been suspended for some period of time.

## OVERVIEW

**ACTION:** The SCRTD Board of Directors discuss Benefit Assessment

### TASKS:

- o Obtain an original copy of the Board Report and any attachments, Box Items or other copy relevant to the Benefit Assessment program from the District Secretary's Office. (see BOARD REPORT AND RESOLUTIONS, Section A)
- o Appeals Case file reviewed for completeness of documentation supporting staff recommendation (see CASE FILES, Planner's Checklist)

**ACTION:** SCRTD Board of Directors approve Board Report

### TASKS:

- o Request by memo, original signed copies of Benefit Assessment Resolutions with seal from Board Secretary's Office, ask to be called to arrange pick-up when they are ready (see BOARD REPORTS and RESOLUTIONS, Section B)
- o Pickup case files (as indicated on Board Report) for processing (see CASE FILES)
- o Prepare notice to AUDITOR-CONTROLLER'S OFFICE, announcing change in the direct assessment fee (see Auditor-Controller Notification, Section A)

**ACTION:** Notice to Auditor-Controller's Office is returned with signature from General Manager

### TASKS:

- o Process notice to Auditor-Controller to revise assessment (see AUDITOR-CONTROLLER NOTIFICATION, Section B)
- o Send notice to Property Owner of Board action (see PROPERTY OWNER NOTIFICATION)
- o Revise Benefit Assessment Computerized data base (see CALCULATION OF REVISED ASSESSMENT)
- o Revise Benefit Assessment hard copy data base (see DATA BASE MANUALS)

**ACTION:** Noticing and Revisions completed

**TASKS:**

- o Complete subject file for Board Meeting (see APPEALS CHANGE SUBJECT FILE)
- o Review case file (see CASE FILES, INDIVIDUAL CASE FILE REVIEW CHECK LIST)

BOARD REPORT PROCESS

## BOARD REPORTS AND RESOLUTIONS

A. On the day before the SCRTD Board meeting, obtain an original copy of Benefit Assessment related Board Reports from the District Secretary's Office located on the second floor (see SCRTD Schedule of Meetings, pages 5 and 6).

1. If the Board report is a box item or NOT a decision on an appeals case the original report is filed in the subject file and one copy is placed in the Board Report Notebook
2. If the Board takes action on an appeals case, the report (see sample, page 7) will contain the following:
  - o Memo from General Manager to the Board with background information
  - o Agreement between SCRTD and petitioner
  - o An unsigned copy of the resolution (signed version follows later)

Xerox copies of the Board Report and distribute as follows:

- a. A copy of the complete Board Report in the Board Report Notebook. Update the Table of Contents and include the changed page
  - b. A copy of the Board Report cover memo, agreement and resolution for each of the case files acted upon by the SCRTD Board. Discard any previous unsigned copies of the board report and keep the most up to date board actions in the file
  - c. Hold the original copy of the Board report for noticing procedures, xeroxing, etc. After processing has been completed, use this copy for the subject file
- B. Board of Directors Resolution on any appeals action is available on or after the date of the board meeting.

1. Submit a memo (see sample, page 14) listing resolutions needed to the District Secretary's Office to obtain two original signed and sealed resolutions (see sample, page 16) and handle as follows:
  - a. Have resolutions signed (see RESOLUTION AND AGREEMENT SIGNING PROCEDURES, page 15)
  - b. Distribute copies of Resolutions as follows:
    - o One original in case file
    - o Hold one original for processing and later file in subject file
    - o Make one copy for Board Report notebook as above
  - c. Use Board Report Checklist to review process (see Sample, page 4)

## BOARD REPORT CHECKLIST

- O BOARD REPORT FOR CONSIDERATION OF ACTION ON APPEALS CASE
  - o Place one copy of the Board Report in District's Notebook
  - o Hold one original copy of the Board Report for preparing notices and correcting Benefit Assessments and closing appeals case files
  - o Xerox copies of the Board Report and insert one copy into each file for cases considered by the Board
    - Include signed Agreement attached to the Board Report and unsigned copy of the Resolution for each particular case
    - Discard any unsigned copy(ies) of the Agreement and extra copy(ies) of the Resolution already in the case file
- O OTHER BOARD REPORTS OR BOX ITEM REPORTS
  - o Place a copy of Board Report or other report in Board Report Notebook
  - o Make one copy of Report for subject file
- O ALL REPORTS RELATED TO BENEFIT ASSESSMENT
  - o Update and reprint the Table of Contents
  - o Replace Table of Contents with revised version in Board Report Notebook
- O SIGNED RESOLUTIONS
  - o Obtain Resolution with signature and seal and Agreement
  - o Obtain signatures (see RESOLUTION AND AGREEMENT SIGNING PROCEDURES, page 15)
  - o Place one copy in District's Notebook
  - o Hold one original copy for subject file
  - o Xerox copies and insert one copy into each file for cases considered by the Board

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

1988

SCHEDULE OF MEETINGS/CONFERENCES INVOLVING  
BOARD OF DIRECTORS

(All Board and Committee of the Whole meetings scheduled for  
1:00 P.M. unless noted)

Thurs., January 7	Committee of the Whole
Thurs., January 14	Board
Jan. 24-28	APTA Management Conference Fort Lauderdale, FL Marriott Hotel
# Thurs., January 28	Board
Thurs., February 4	Committee of the Whole
Thurs., February 11	Board
Thurs., February 25	Board
Thurs., March 3	Committee of the Whole
Thurs., March 10	Board
March 13-15	APTA Legislative Conference Washington, D.C. J. W. Marriott Hotel
Thurs., March 24	Board
Thurs., April 7	Committee of the Whole
Thurs., April 14	Board
April 15-20	APTA Western Conference Monterey, CA Doubletree Hotel
Thurs., April 28	Board
Thurs., May 5	Committee of the Whole
\$ Thurs., May 12	Board
May 12 & 13	California Transit Assn. Spring Meeting Hyatt Regency, Sacramento
May 14-19	APTA Eastern Conference St. Louis, MO Omni Hotel
Thurs., May 26	Board



DATEEVENT

Thurs., June 2  
June 5-9

Committee of the Whole  
APTA Rapid Transit Conference  
Buffalo, NY  
Hyatt Hotel  
Board  
Board

# Thurs., June 9  
Thurs., June 23

Thurs., July 7  
Thurs., July 14  
Thurs., July 28

Committee of the Whole  
Board  
Board

Thurs., August 4  
Thurs., August 11  
Thurs., August 25

Committee of the Whole  
Board  
Board

Thurs., September 1  
Thurs., September 8  
Thurs., September 22

Committee of the Whole  
Board  
Board

October 2-6

APTA Annual Meeting  
Montreal, Canada  
Queen Elizabeth Hotel  
Committee of the Whole  
Board  
Board

# Thurs., October 6  
Thurs., October 13  
Thurs., October 27

Thurs., November 3  
Thurs., November 10  
\* Fri., November 25

Committee of the Whole  
Board  
Board

Dec. 1 & 2

California Transit Assn.  
Annual Meeting  
Anaheim Hilton, Anaheim  
Committee of the Whole  
Board  
Board

§ Thurs., December 1  
Thurs., December 8  
Thurs., December 22

\* - Change of date due to Holiday  
# - Possible change of date due to APTA meeting  
§ - Possible change of date

District Secretary's Office  
Date: December 3, 1987



**RTD**

John A. Dyer  
General Manager

December 7, 1987

TO: Board of Directors

FROM: John A. Dyer

SUBJECT: CONSIDER THE GENERAL MANAGER'S REPORT FOR APPROVAL OF AGREEMENTS BETWEEN PETITIONERS AND THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT AND ADOPTION OF RESOLUTIONS ORDERING CHANGE IN BENEFIT ASSESSMENT RECOMMENDATION

RECOMMENDATION

It is recommended that the Board approve the attached agreements and adopt the proposed resolutions to reduce the assessments on properties covered by the following appeals cases:

<u>APPEALS</u> <u>CASE NO.</u>	<u>PARCEL NO.</u>	<u>BASIS OF APPEAL</u>
A1-120-86	5161-026-010	Residential
A1-345-86	5143-023-012	Incorrect Calculation

BACKGROUND

In accordance with the assessment appeals procedures adopted by the Board of Directors, the staff has reviewed the petitions and discussed the basis for appeal with the Petitioners.

The evidence required to support the claim for reduction of assessment has been received from each Petitioner and has been reviewed carefully by the staff. In each case the evidence is sufficient to support a recommendation of reduction of the assessment.

As indicated in the attached agreements, the Petitioners have reviewed the proposed agreements and concur with the findings of the staff and agree to the revised assessments. In order for an assessment to be changed for a particular Petitioner, the attached resolution for that Petitioner must be adopted by a two-thirds vote.

Board of Directors  
December 7, 1987  
Page Two

Passage of a resolution by a two-thirds vote would constitute Board acceptance of the agreement and would meet the requirements of Section 33001.5(e) of the Public Utilities Code which allows the Board to change an assessment.

Respectfully,

John A. Dyer

By: Albert H. Perdon  
Assistant General Manager  
of Planning and Communications

By: Gary S. Spivack  
Director of Planning

Attachments

RESOLUTION OF THE BOARD OF DIRECTORS  
OF THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT,  
IN THE CASE OF BENEFIT ASSESSMENT APPEALS  
PETITION NUMBER A1-120-86

WHEREAS, the California State Legislature has enacted Sections 33000, et seq., of the California Public Utilities Code (the "Code") enabling the Southern California Rapid Transit District ("District") to create special benefit assessment districts in the vicinity of proposed stations for the Metro Rail system and to levy special benefit assessments therein in order to finance a portion of the cost of the Metro Rail system provided certain procedural requirements are met; and

WHEREAS, Section 33001.5(e) of the Code permits the Board, by resolution adopted by 2/3 vote, to provide for changes in an assessment to particular real property arising out of changes in the parcel or floor area of that real property; and

WHEREAS, in accordance with adopted procedures, Francis J. Montgomery (the "Petitioner"), owner of real property identified by Parcel Number 5161-026-010 (the "Property"), did file, on December 8, 1986, with this Board a Benefit Assessment Appeals Petition, identified by Case Number A1-120-86, which requested the reduction of the assessment for the Property on the grounds that the Property, in part, is used as an artist's living quarters; and

WHEREAS, on August 11, 1987, a staff conference was held between the Petitioner and representatives of the District in which issues raised by the Petitioner were resolved to the satisfaction of both parties and the evidence produced demonstrates that the number of assessable square feet for the Property should be changed;

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Southern California Rapid Transit District:

1. The agreement between the Southern California Rapid Transit District and Francis J. Montgomery, owner of Parcel Number 5161-026-010, regarding Benefit Assessment Appeals Case Number A1-120-86, attached hereto, is hereby approved.

2. The SCRTD District Assessment for Parcel Number 5161-026-010 is hereby changed to \$2,285 based on 7,617 assessable square feet.

#### CERTIFICATION

The undersigned, duly qualified and acting as District Secretary of the Southern California Rapid Transit District, certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Board of Directors of the Southern California Rapid Transit District held on December 10, 1987.

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District Secretary

Dated:

(SEAL)

AGREEMENT BETWEEN THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
AND FRANCIS J. MONTGOMERY, OWNER OF PARCEL  
NUMBER 5161-026-010 REGARDING BENEFIT ASSESSMENT APPEALS  
CASE NUMBER A1-120-86

On December 8, 1986, Francis J. Montgomery (Petitioner) filed a petition with the Board of Directors of the Southern California Rapid Transit District (SCRTD) requesting reduction in the SCRTD assessment for the property located at 260 and 262 South Main Street, identified by parcel number 5161-026-010 (the Property) on the grounds that the Property will not benefit from the Metro Rail project and that it is used, in part, as an artist's living quarters. The Petitioner claims that the square footage used for residential purposes is exempt from assessment.

On August 11, 1987, a staff conference was held between representatives of SCRTD and the Petitioner. To resolve the issues raised in the Petitioner's claim, the Petitioner and the SCRTD do agree as follows:

1. Square footages used to calculate the original 1986 assessment for the Property were:

Commercial/Retail	18,450 square feet
Parcel	11,413 square feet

Based upon these square footages, the original SCRTD assessment for the Property was calculated to be \$5,535. This assessment was based upon the square footage of assessable improvements which was larger than the square footage of the parcel.

2. The evidence submitted by the Petitioner to support his contention of residential use is as follows:
  - a. A three year lease agreement between Francis J. Montgomery and Dennis Curtis for 262 South Main Street, "being the entire second floor of the building at that address". Dennis Curtis resides in the premises pursuant to the lease.
  - b. Floor plans for the first and second floors of the improvement indicating that the first floor contains 7,617 square feet, the second floor contains 7,296 square feet, and that the total square footage of the improvement is 14,913. ←
3. A site visit by a representative of SCRTD on September 17, 1987 verified that the first floor of the improvement is commercial and the 2nd floor residential.

4. Based upon the above evidence, the square footage used for the purpose of revising the SCRTD assessment for the Property is as follows:

a. The 2nd floor of the improvement used as living quarters is thus exempt from assessment.

Therefore the square footages for the purposes of revising the SCRTD assessment for the Property are as follows:

Residential (Exempt)	7,296 square feet
Retail (assessable)	7,617 square feet
Total improvement	14,913 square feet
Parcel	11,413 square feet

The improvement contains a mix of exempt and assessable uses. Pursuant to the Resolution Creating Special Benefit Assessment Districts A1 and A2 for MOS-1 Segment of the Metro Rail System adopted by the SCRTD Board of Directors on July 11, 1985, the assessment is determined on the basis of the percentage of the improvement that is assessable multiplied by the square footage of the improvement or parcel, whichever is greater, times the assessment rate.

Fifty-one percent of the improvement is assessable (7,617 square feet divided by 14,913 square feet). 49% of improvement is exempt. To determine the assessable square footage of the parcel, 49% (the percentage of the improvement that is exempt) is subtracted from 100%. Therefore, 51% of the square footage of the parcel is assessable. The assessable square footage of the improvement, 7,617 square feet, is greater than the assessable square footage of the parcel, 5,820 square feet (51% x 11,413 square feet of total parcel). Therefore, the assessment is based on 7,617 square feet of assessable improvement.

In conformance with the above described resolution and the Procedures for Appealing Southern California Rapid Transit District Benefit Assessment, as amended, the revised assessable square footage is 7,617 and the revised the revised SCRTD assessment for the Property is \$2,285.

5. The exemption of 7,296 square feet residential use is valid for the Tax Year July 1, 1986 to June 30, 1987. When the Petitioner receives a Joint Consolidated Tax Bill from the

Los Angeles County Tax Collector indicating a SCRTD assessment, the Petitioner will be required to re-certify the percentage of the improvement which is exempt from assessment by virtue of its residential use unless alternative procedures for such re-certification are adopted by the SCRTD Board.

The staff and Petitioner were unable to agree on the issue of the benefit to the Property resulting from the Metro Rail Project.

6. Acceptance of the Agreement by the Petitioner and by the SCRTD Board of Directors shall constitute a complete and final settlement of the residential exemption issue raised in the Petitioner's claim of December 8, 1986 regarding the Property have been settled.

  
Francis J. Montgomery  
PETITIONER

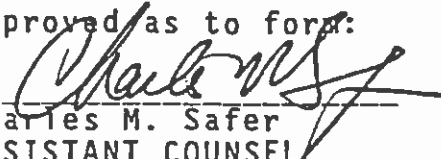
Date: Nov. 20. 19 87

For SCRTD:

\_\_\_\_\_  
John A. Dyer  
GENERAL MANAGER

Date: \_\_\_\_\_

Approved as to form:

  
\_\_\_\_\_  
Charles M. Safer  
ASSISTANT COUNSEL

Date: 11-25-87



SAMPLE MEMO

OCPM-4  
REV 7/85

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

Dec 11, 1987

MEMO TO

Donna

IN RE:

Board Report Needed:  
from December 10, 1987 Board Meeting

I need a signed and sealed copy of the Board Resolution and agreement for Case #s. A1-120-86 & A1-345-86. Could you prepare these for me please, and call me when they are ready for pick up. Thank you

Marinette x3267

I will bring them back for Ms. Colens signature once I have obtained Mr. Figg's signature.

## RESOLUTION AND AGREEMENT SIGNING PROCEDURES

- A. Once the Resolution and Agreement have been prepared by the District Secretary's Office they must be picked up and then taken for signature. The Resolution and Agreement need to be signed by the General Manager and the District Secretary.

To obtain the General Manager's signature:

- a. Put Resolutions from a single Board Meeting all in one file folder; ie. (all documents in the same folder)
  - b. Attach a sticky note written out to (Marylou) the General Manager's secretary, stating that the documents need the General Manager's signature. On the note include your name and extension so that she can call you back when they are ready for pick up
  - c. Take them up to the 6th Floor, the General Manager's office
  - d. Pick up the documents when they are ready
- B. After you pick up the documents with the General Manager's signature they must then be signed by the District Secretary.

To obtain the District Secretary's signature

- a. Leave all documents in the same folder
- b. Attach a new sticky to any one of the secretaries in the District Secretary's Office stating that you need the District Secretary's signature, include your name and extension so that they may call you for pick up
- c. Take them to the 2nd Floor, District Secretary's Office
- d. Pick up the documents when they are ready

RESOLUTION OF THE BOARD OF DIRECTORS  
OF THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT,  
IN THE CASE OF BENEFIT ASSESSMENT APPEALS  
PETITION NUMBER A1-345-86

WHEREAS, the California State Legislature has enacted Sections 33000, et seq., of the California Public Utilities Code (the "Code") enabling the Southern California Rapid Transit District ("District") to create special benefit assessment districts in the vicinity of proposed stations for the Metro Rail system and to levy special benefit assessments therein in order to finance a portion of the cost of the Metro Rail system provided certain procedural requirements are met; and

WHEREAS, Section 33001.5(e) of the Code permits the Board, by resolution adopted by 2/3 vote, to provide for changes in an assessment to particular real property arising out of changes in the parcel or floor area of that real property; and

WHEREAS, in accordance with adopted procedures, Fujiken Company Ltd. (the "Petitioner"), owner of real property identified by Parcel Number 5143-023-012 (the "Property"), did file, on May 20, 1987, with this Board a Benefit Assessment Appeals Petition, identified by Case Number A1-345-86, which requested the reduction of the assessment for the Property on the grounds that the assessment was incorrectly calculated; and

WHEREAS, issues raised by the Petitioner were resolved to the satisfaction of both parties and the evidence produced demonstrates that the number of assessable square feet for the Property should be changed;

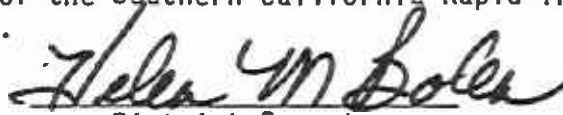
NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Southern California Rapid Transit District:

1. The agreement between the Southern California Rapid Transit District and Fujiken Company Ltd., owner of Parcel Number 5143-023-012, regarding Benefit Assessment Appeals Case Number A1-345-86, attached hereto, is hereby approved.

2. The SCRTD District Assessment for Parcel Number 5143-023-012 is hereby changed to \$55,252 based on 184,175 assessable square feet.

CERTIFICATION

The undersigned, duly qualified and acting as District Secretary of the Southern California Rapid Transit District, certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Board of Directors of the Southern California Rapid Transit District held on December 10, 1987.

  
District Secretary

Dated: December 21, 1987

(SEAL)

AGREEMENT BETWEEN THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
AND FUJIKEN COMPANY LTD,  
OWNER OF PARCEL 5143-023-012, REGARDING BENEFIT ASSESSMENT  
APPEALS CASE NUMBER A1-345-86

On May 20, 1987, Bernard Mullahy (Representative) on behalf of Fujiken Company Ltd. (Petitioner) filed a petition with the Board of Directors of the Southern California Rapid Transit District (SCRTD) requesting reduction in the SCRTD assessment for the property located at 1127 Wilshire Boulevard and identified by Parcel Number 5143-023-012 (the Property) on the grounds that the assessment was incorrectly calculated.

Based on agreement of both parties, procedures were invoked in lieu of a formal staff conference. To resolve the issues raised in the Petitioner's claim, the Petitioner and the SCRTD do agree as follows:

1. Square footages used to calculate the original 1986 assessment for the Property were as follows:

Office	223,040 square feet
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Parcel	27,966 square feet
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Based upon these square footages, the original SCRTD assessment for the Property was calculated to be \$66,912. This assessment was based upon the square footage of a 16 storied improvement which was larger than the square footage of the assessable parcel.

2. The Representative alleged that the District incorrectly calculated the square footage of the floors. The evidence submitted by the Representative to support his contention was building floor plans of the floors in question.

A field inspection was conducted on October 27, 1987 by a representative of SCRTD to verify that the floors corresponded to the floor plans submitted.

3. The evidence supports the Petitioner's contention that the improvement's square footage was incorrectly calculated. A field inspection verified that the improvement's configuration corresponds to the submitted floor plans.

Examination of the floor plans submitted by the Petitioner resulted in a total assessable square footage of 184,175. Therefore, the square footage for purposes of revising the SCRTD assessment for the Property is as follows:

Office	184,175 square feet
Parcel	27,966 square feet

Based upon the 184,175 square feet of assessable improvements and in conformance with the Resolution Creating Special Benefit Assessment District A1 and A2 for the MOS-1 Segment of the Metro Rail System adopted by the SCRTD Board of Directors on July 11, 1985, and Procedures for Appealing Southern California Rapid Transit District Benefit Assessments, as Amended, the revised SCRTD assessment for Property 5143-023-012 is \$55,252.

4. The assessment based on 184,175 square feet of improvement will remain valid until the use or square footage of the property changes.
5. The Petitioner, by executing this agreement, agrees to an assessment for Property 5143-023-012 of \$55,252 based on 184,175 square feet of assessable improvement. Execution of this agreement by the Petitioner and approval by the SCRTD Board of Directors constitutes a complete and final settlement of all issues raised in the Petitioner's claim of May 20, 1987.

For the Petitioner,  
FUJIKEN COMPANY LTD.

  
Bernard Mullahy  
REPRESENTATIVE

Date: 11/18/87

For the SCRTD:

  
John A. Dyer  
GENERAL MANAGER

Date: 12/15/87

Approved as to form:

  
Charles M. Safer  
ASSISTANT COUNSEL

Date: 11-20-87

CASE FILES

## CASE FILES

- A. After SCRTD Board Action on Benefit Assessment Appeals cases, the individual case file is reviewed.
- o Pull all case files dealt with at the Board meeting (use Board Report as a reference)
  - o The planner should have put the file in order by this time (see Planner's Checklist for closing file, page 21)
  - o Check parcel number for consistency throughout the file, e.g., Stipulations, Appeals Form, Correspondence, Joint Consolidated Tax Bill
- B. After entire process for correcting Benefit Assessments has been completed, review each individual case file for proper documentation (see INDIVIDUAL CASE FILE REVIEW CHECKLIST, page 22).



PLANNER'S CHECKLIST FOR CLOSING CASE

- \_\_\_\_\_ Appeals Petition Complete
- \_\_\_\_\_ Request for Appeals Support Information
- \_\_\_\_\_ Staff Conference Notification
- \_\_\_\_\_ Documentation of Contact complete (e.g., contact forms for calls and letters including request for agreed upon information, etc.)
- CALCULATION OF REVISED ASSESSMENT FORM completed, signed and dated.
- \_\_\_\_\_ Exhibits identified in the stipulations complete, labeled and in order
- \_\_\_\_\_ Notification of Board Meeting
- \_\_\_\_\_ Unsigned Copy of Agreement placed in case file
- \_\_\_\_\_ Unsigned Copy of Resolution placed in case file
- \_\_\_\_\_ Duplicate and unnecessary drafts removed

\_\_\_\_\_  
BOARD MEETING

\_\_\_\_\_  
CASE NUMBER

INDIVIDUAL CASE FILE REVIEW CHECKLIST

\_\_\_\_\_ Board Report

\_\_\_\_\_ Agreement with signatures

\_\_\_\_\_ Resolution with seal

\_\_\_\_\_ Notification of assessment change with attachments

\_\_\_\_\_ Letter to Assessor, signed

\_\_\_\_\_ Copy of change form

\_\_\_\_\_ Green copy of certification form

\_\_\_\_\_ Calculation form

\_\_\_\_\_ REVIEW COMPLETE

Comments:

AUDITOR-CONTROLLER NOTIFICATIONS

## AUDITOR-CONTROLLER NOTIFICATION

- A. Prepare notice to AUDITOR-CONTROLLER'S OFFICE, announcing change in the direct assessment fee.
1. Prepare cover transmittal letter **CORRECTION JOINT CONSOLIDATED TAX BILL** FORM BALL (see sample, page 25) Extra copies may be printed ahead of time as this form letter does not change
    - a. Print on General Manager letterhead using letter quality printer
    - b. Do NOT date letter
    - c. Prepare envelope with red logo
  2. Type in DIRECT ASSESSMENT CORRECTION LIST FORM according to working copy (see Instructions for Preparation, page 27)
  3. Compile transmittal materials
    - a. Make 5 copies of letter and form, collate and staple copies only
    - b. Prepare letter size folder with items for General Manager's signature to give to Ambrosia (person who forwards letter to General Manager for signature).
    - c. Attach a sticky note written out to Ambrosia stating that you would like the General Manager's signature. On the note include your extension so that she can call you when they are ready for pick up  
Include:  
  
paper clipped on right side of folder:  
Original letter with forms  
  
paper clipped on left side of folder:  
2 copies, with yellow highlighter in right hand corner, marked "Yellow" (in lieu of yellow paper)  
2 copies, no highlighting
    - d. Hold copy for follow-up. Note in corner: "for signature mm/dd/yy"
- B. Take folder to Ambrosia, (Administration and Special Studies Office) she will call you for pick up after General Manager has signed it.

- C. After transmittal letter for Auditor-Controller's Office is returned with signature from General Manager, process as follows:
  1. Make a copy of signed letter and Direct Assessment Correction List form for the following:
    - a. Board Meeting Packet (see APPEALS CHANGE SUBJECT FILE)
    - b. Each pertinent Property Owner Notification (see PROPERTY OWNER NOTIFICATION) and each Case file (see CASE FILES)
  2. Mail original letter and form to Auditor-Controller's Office



**RTD**

John A. Dyer  
General Manager

DEC 15 1987

Mr. Michael Galindo  
Division Chief, Tax Division  
Department of Auditor-Controller  
153 Hall of Administration  
Los Angeles, California 90012

Attention: Linda Aquaro

Dear Mr. Galindo:

SCRTD - Central Business District DIRECT ASSESSMENTS  
CORRECTION TO JOINT CONSOLIDATED TAX BILL

In accordance with previous arrangements for processing corrections to SCRTD Metro Rail assessments, it is requested that a corrected Joint Consolidated Tax Bill be issued for the properties listed on the attached form.

If you have any questions, please contact Gary S. Spivack, Director of Planning, SCRTD, 425 South Main Street, Los Angeles, California, 90013, at (213) 972-6170.

Sincerely,

A handwritten signature in black ink, appearing to read 'John A. Dyer', with a long horizontal flourish extending to the right.

John A. Dyer

Attachment

DIRECT ASSESSMENT CORRECTION LIST

Agency Name SCRTD  
 Account No. 37.02  
 Authorization No. \_\_\_\_\_

Rate Year	1986-1987
-----------	-----------

	Parcel Number	Seq. No.	CD	Original Amt.	New Amt.
1	5143-023-012	86000	5	66,912	55,251
2	5161-026-010	86000	7	5,535	2,285
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Instructions for Preparation of  
County of Los Angeles  
DIRECT ASSESSMENT CORRECTION LIST

Prepare a working copy of the Form for each Account No.

A1 parcels: enter 37.02 for agency account number.  
A2 parcels: enter 37.03 for agency account number.  
In certain special cases 37.04 is used

1. Take Account Number from LOS9 Report (each account number should be put on a separate form)

2. Leave "Authorization No." blank

3. Enter Parcel Number for each case as it appears in the Board Report

List in Parcel Number order - lowest number first

Make notation of case number in the margin for convenience in cross-checking

4. The Sequence Number to be used for the 1986-87 tax year is 86000

\*Account Number on DIRECT ASSESSMENT CORRECTION LIST must match Account Number on LOS9 Report\*

5. Calculate Check Digit (use either hand calculation or pc calculation methods as outlined in following pages)

6. Take Original Amount from the LOS9 Report

"Original Amount" refers to original amount of the assessment. Verify that the amount shown on the LOS9 Report matches the amount on the copy of the stipulations in case file.

7. Use Agreements (attached to Board Report) to verify Parcel Number, Original Amount, and to enter New Amount

Verify Parcel Number and New Amount with signed resolutions

8. Complete "Prepared By" and "Date".

9. Leave "Batch Number" blank.

Type clean copies of the Forms and prepare transmittal letter.



# DIRECT ASSESSMENT CORRECTION LIST

Agency Name SCRTD  
Account No. (1)  
Authorization No. (2)

Rate Year	1986-1987
-----------	-----------

	Parcel Number	Seq. No.	CD	Original Amt.	New Amt.
1	(3)	(4)	(5)	(6)	(7)
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Prepared By (8) Date \_\_\_\_\_

Batch Number	(9)
--------------	-----

CHECK DIGIT COMPUTATION  
HAND CALCULATION METHOD

1. Start with the left hand (high order) digit of the Parcel Number and double each alternate (left hand 1 to 3, 5, 7, etc.)
2. Add together each of the digits created by doubling (9 doubled = 18: add 1 + 8) with each of the original digits which was not doubled
3. Subtract the last (low order) digit of the result of the addition (in 2 above) from 10 giving the check digit

(10 - 0 = 10: the check digit is 0)  
 (10 - 1 = 9: the check digit is 9)  
 (10 - 9 = 1: the check digit is 1)

Examples:

Digit Positions:	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10																																																												
Parcel Number:	<table style="margin: auto; border-collapse: collapse;"> <tr><td style="border: 1px solid black; padding: 2px;">1</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">3</td><td style="border: 1px solid black; padding: 2px;">1</td><td style="border: 1px solid black; padding: 2px;">2</td><td style="border: 1px solid black; padding: 2px;">7</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">3</td><td style="border: 1px solid black; padding: 2px;">1</td></tr> </table>	1	0	3	1	2	7	0	0	3	1	<table style="margin: auto; border-collapse: collapse;"> <tr><td style="border: 1px solid black; padding: 2px;">4</td><td style="border: 1px solid black; padding: 2px;">9</td><td style="border: 1px solid black; padding: 2px;">4</td><td style="border: 1px solid black; padding: 2px;">7</td><td style="border: 1px solid black; padding: 2px;">9</td><td style="border: 1px solid black; padding: 2px;">9</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">0</td></tr> </table>	4	9	4	7	9	9	0	0	0	0																																								
1	0	3	1	2	7	0	0	3	1																																																					
4	9	4	7	9	9	0	0	0	0																																																					
Step 1.	<table style="margin: auto; border-collapse: collapse;"> <tr><td style="border: 1px solid black; padding: 2px;">2</td><td style="border: 1px solid black; padding: 2px;">6</td><td style="border: 1px solid black; padding: 2px;">4</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">6</td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td></tr> </table>	2	6	4	0	6						<table style="margin: auto; border-collapse: collapse;"> <tr><td style="border: 1px solid black; padding: 2px;">8</td><td style="border: 1px solid black; padding: 2px;">8</td><td style="border: 1px solid black; padding: 2px;">1</td><td style="border: 1px solid black; padding: 2px;">8</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;">0</td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td><td style="border: 1px solid black; padding: 2px;"></td></tr> </table>	8	8	1	8	0	0																																												
2	6	4	0	6																																																										
8	8	1	8	0	0																																																									
Step 2.	<table style="margin: auto; border-collapse: collapse;"> <tr><td colspan="10" style="text-align: center;">2+0+6+1+4+7+0+0+6+1</td></tr> <tr><td colspan="10" style="text-align: center;">= 27</td></tr> </table>	2+0+6+1+4+7+0+0+6+1										= 27										<table style="margin: auto; border-collapse: collapse;"> <tr><td colspan="10" style="text-align: center;">8+9+8+7+1+8+9+0+0+0+0</td></tr> <tr><td colspan="10" style="text-align: center;">= 50</td></tr> </table>	8+9+8+7+1+8+9+0+0+0+0										= 50																													
2+0+6+1+4+7+0+0+6+1																																																														
= 27																																																														
8+9+8+7+1+8+9+0+0+0+0																																																														
= 50																																																														
Step 3.	<table style="margin: auto; border-collapse: collapse;"> <tr><td colspan="10" style="text-align: center;">10</td></tr> <tr><td colspan="10" style="text-align: center;">- 7</td></tr> <tr><td colspan="10" style="border-top: 1px solid black; text-align: center;">= 3</td></tr> </table>	10										- 7										= 3										<table style="margin: auto; border-collapse: collapse;"> <tr><td colspan="10" style="text-align: center;">10</td></tr> <tr><td colspan="10" style="text-align: center;">- 0</td></tr> <tr><td colspan="10" style="border-top: 1px solid black; text-align: center;">= 0</td></tr> </table>	10										- 0										= 0									
10																																																														
- 7																																																														
= 3																																																														
10																																																														
- 0																																																														
= 0																																																														
Check Digit	= 3	= 0																																																												

## CALCULATE CHECKDIGIT

Set pc to work in dBASE III

A. Prepare checkdigit database.

open chkdgt data base. At dot prompt.

TYPE:

.USE CHKDGT <-|

Clear out any parcel numbers from prior runs. At dot prompt.

TYPE:

.ZAP <-|

follow prompts... computer will ask you if you  
want to zap past info Y/N? Answer by typing

Y <-|

Create a record for each parcel number for which you need a  
checkdigit. At dot prompt.

TYPE:

.APPEND <-|

this brings up an empty record screen

Type the 10 digit parcel number onto parcel field  
(within the highlighted area; type all 10 digits  
continuously without spaces or bars [all blocks will be  
filled])

Press page down button. (more highlighted empty blocks  
will appear) Continue typing 10 digit parcel numbers  
until parcel numbers have been entered for all  
properties

Exit record screen.

TYPE:

Ctrl W <-|

do this after last parcel number is entered. This  
will take you out of record file and give you a  
dot prompt.

Close file.

TYPE:

.USE <-|

B. Run program to calculate checkdigit.

Be sure printer is set up. At dot prompt.

TYPE:

```
.DO CHKDGT <-|
```

Follow prompt screen will ask you for file name containing parcel numbers.

TYPE:

```
CHKDGT <-|
```

As the checkdigit is calculated both the parcel number and the checkdigit will be displayed on the screen.

When the checkdigit has been calculated for all parcel numbers, a list of parcel numbers and checkdigits will be printed (see sample, page 32).

Your file is closed and the program will return you to the dot prompt.

SAMPLE CHECK DIGIT CALCULATION

Record#	PARCELNO	CHKDGT
1	5142005019	6
2	5142005003	4

PROPERTY OWNER NOTIFICATIONS

PROPERTY OWNER NOTIFICATION LETTERS

A. Create letter for property owner notification of Board Action.

1. Use form letter (BA12bREV.1, see sample, page 35)

EDIT THE FOLLOWING TO CONFORM WITH INDIVIDUAL CASE DATA:

property owner/representative  
mailing address  
salutation  
case number  
parcel number  
property address/location  
Meeting Date  
\$ assessment  
date processing should be complete

\* In some cases special attachments are necessary, if so you should note "ATTACHMENTS" on the bottom of the letter

2. Print on Director of Planning letterhead using letter quality printer (see sample, page 37)
3. Prepare 5 copies of unsigned letter
4. Prepare letter size file folder for transmittal of letters for Director of Planning's signature. Each case/letter should have its own folder  
Include:

Paper clipped on right side of folder:  
Original letter

Paper clipped on left side of folder:  
2 copies, with yellow highlighter in right hand corner, marked "Yellow" (in lieu of yellow paper)  
2 copies, no highlighting  
Hold one copy for follow-up. Note in corner: "for signature mm/dd/yy"

5. Take to Anne Odell with a sticky note: "Petitioner Notification Letters for Director of Planning's Signature". Put follow-up copy and any other related information in each case file. Keep a list of letters out for signature. Follow up, if they are not returned within a reasonable time

B. After the Director of Planning signs property owner notification letter, prepare original letter for mailing certified mail.

1. Place copy of signed letter and all attachments in individual case file
2. Each original letter to property owner will be mailed via certified mail including a copy of NOTICE TO AUDITOR CONTROLLER'S OFFICE FOR CORRECTION TO JOINT CONSOLIDATED TAX BILL and signed copy of the cover letter (see instructions CERTIFIED MAIL PROCESS, page 39)
3. Xerox a copy of the envelope and the Certification form (see sample, Page 42)

Write case #, petitioner's and/or representative's name in corner of copy, date mailed

Hold until white and green copies of certification form are returned

4. Signed copy (green slip) is attached to the copy of letter and put in case file when it is returned
5. Place copy of all letters with attachments in the subject file



NOTICE OF BOARD ACTION ON AGREEMENT AFTER JUNE 1

BA12Rev.1

<1. Name>  
<2. Address>

Dear <3. Property Owner>:

The Metro Rail Benefit Assessment Appeals Case <4. Case Number> for the property identified by the Assessor's Mapbook No. <5. Parcel Number>, located at <6. Property Address> was approved by the Southern California Rapid Transit District Board of Directors at their <7. Board Meeting Date>, Board meeting. As a result, the direct assessment for your property, <5. Parcel Number>, has been changed to <8. \$ Assessment>. The SCRTD has forwarded this information to the Los Angeles County Auditor-Controller's Office for Adjustment to your account.

The 1986-87 Tax Roll has been officially closed by the Auditor Controller's Office. There will be no more corrected Joint Consolidated Tax Bills issued for the 1986-87 Tax Year. Any changes in assessments are now processed manually.

If you have paid the full amount of both installments of your 1986-87 Joint Consolidated Tax Bill, and these payments have been recorded, a refund is due to you. A refund check will be issued to you by the Auditor-Controller's Office for the amount overpaid. If the SCRTD Board has approved an adjustment to your benefit assessment prior to September 1987, the earliest receipt of your refund check is November 1987. If the Board makes an adjustment on your assessment after September 1987, you should expect a refund check within 60 days after the Auditor-Controller's office has been notified by SCRTD of the Board's action.

If you have made a partial payment on your 1986-87 Joint Consolidated Tax Bill, you may have received a delinquent tax notice which includes a penalty payment based on the unpaid balance. This delinquent tax notice is automatically generated by the Treasurer-Tax Collector when only a partial payment is made. If your partial payment did not equal the taxes and adjusted SCRTD assessment, there will be a penalty due on this unpaid portion.

If your partial payment is larger than taxes and the adjusted SCRTD assessment, you should receive a refund of the penalty (if paid) on the amount that represents that portion of the paid assessment that was eliminated. To request the refund, send a letter entitled "claim for Refund of Penalty" to:

Tax Division, Office of the Auditor-Controller  
500 West Temple Street, Room 153  
Los Angeles, California 90013

<1. Name>

Page Two

If your account with the Treasurer-Tax Collector indicates that any taxes have not been paid as of June 30, 1987, your 1987-88 Joint Consolidated Tax Bill will contain a notation: "Tax Defaulted." Also, the Treasurer-Tax Collector will automatically include the property on the list of 1986-87 delinquent parcels that is published in August 1987. After June 30, even if taxes for 1986-87, the treasurer-Tax Collector will not be able to prevent the computer from placing a "Tax Defaulted" notation on your next Joint Consolidated Tax bill nor prevent inclusion on the published list of delinquent properties. If you have no amount outstanding on your 1986-87 account, please disregard the "Tax Defaulted" notation.

Please Contact Jennifer Coile at (213) 237-2125 or David Sikes at (213) 237-2129 if you have any questions.

Sincerely,

Gary Spivack



Gary S. Spivack  
Director of Planning

December 29, 1987

Mr. Bernard Mullahy  
8730 Wilshire Boulevard  
Beverly Hills, CA 90211

Dear Mr. Mullahy:

The Metro Rail Benefit Assessment Appeals Case No. A1-345-86, for the property identified by the Assessor's Mapbook Number, Parcel No. 5143-003-012, located at 1127 Wilshire Blvd. Los Angeles, was approved by the Southern California Rapid Transit District Board of Directors at their December 10, 1987 Board meeting. As a result, the direct assessment for your property, Parcel No. 5143-003-012, has been changed to \$55,252. The SCRTD has forwarded this information to the Los Angeles County Auditor-Controller's Office for adjustment to your account.

The 1986-87 Tax Roll has now been officially closed by the Auditor-Controller's Office. There will be no more corrected Joint Consolidated Tax Bills issued for the 1986-87 Tax Year. Any changes in assessments are now processed manually.

If you have paid the full amount of both installments of your 1986-87 Joint Consolidated Tax Bill, and these payments have been recorded, a refund check will be issued to you by the Auditor-Controller's Office for the amount overpaid. You should expect a refund check within 60 days after the Auditor-Controller's Office has been notified by the SCRTD of the Board's action.

If you made a partial payment on your 1986-87 Joint Consolidated Tax Bill, you may have received a delinquent tax notice which includes a penalty payment based on the unpaid balance. This delinquent tax notice is automatically generated by the Treasurer-Tax Collector when only a partial payment is made. If your partial payment did not equal the taxes and adjusted SCRTD assessment, there will be a penalty due on this unpaid portion.

If your partial payment is larger than the taxes and the adjusted SCRTD assessment, you should receive a refund of the amount overpaid. If there is a penalty indicated, you may request a refund of the penalty (if paid) on the amount that represents that portion of the paid assessment that was eliminated. To request the refund, send a letter entitled "Claim for Refund of Penalty" to:

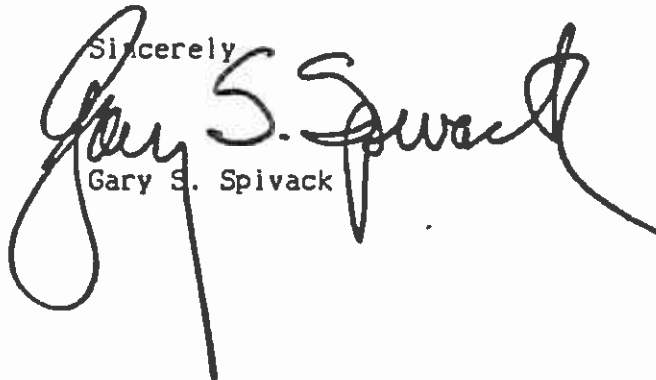
Tax Division, Office of the Auditor-Controller  
500 West Temple Street, Room 153  
Los Angeles, California 90013

Mr. Bernard Mullhay  
Page Two  
December 29, 1987

If your account with the Treasurer-Tax Collector had indicated that any taxes had not been paid as of June 30, 1987, your 1987-88 Joint Consolidated Tax Bill would have automatically included the property on the list of 1986-87, delinquent parcels that was published in August 1987. After June 30, 1987, even if your assessment was reduced so that your account showed no further unpaid taxes for 1986-87, the Treasurer-Tax Collector would not have been able to prevent the computer from placing a "Tax Defaulted" notation on your 1987-88 Joint Consolidated Tax Bill nor prevent inclusion of the property on the published list of delinquent properties. If you have no amount outstanding on your 1986-87 account, please disregard the "Tax Defaulted" notation.

Please contact Jennifer Coile at (213) 237-2125 or David Sikes at (213) 237-2129 if you have any questions.

Sincerely

A handwritten signature in black ink, appearing to read "Gary S. Spivack". The signature is stylized with a large, looping initial "G" and a long, sweeping tail that extends downwards and to the right.

Gary S. Spivack

## CERTIFIED MAIL PROCESS

- O Use green certified mail forms available from SCRTD mail room located in the basement
- O Fill forms out completely:
  - 1. Fill out white slip (see sample, page 40)
    - a. Name  
Address  
City State Zip
    - b. On the receipt for certified mail (write the Planning Department-Your Name). You can write this anywhere along the side
    - c. Do not fill anything else in on that slip (white)
  - 2. Fill out the green slip (see Sample, page 40)
    - a. On the front portion of the green slip (write Planning Department-Your Name) underneath the Address, City, State and Zip Code of the sender
    - b. Check off the box marked certified
    - c. On the back side of the green slip, write the Certified Mail Article Number that is provided on the white slip
    - d. Do not fill anything else in on that slip (green)
- O Attach the receipt for certified mail where the stamp on a letter usually goes
- O Attach the form that is solid green to the back side of the envelope
- O Mail before 3:30 p.m. daily in the SCRTD Mail room in the basement

**CERTIFIED MAIL**

(WHITE)

(GREEN)

**P 363 239 413**  
**RECEIPT FOR CERTIFIED MAIL**

NO INSURANCE COVERAGE PROVIDED—  
 NOT FOR INTERNATIONAL MAIL

(See Reverse)

Sent to <input checked="" type="checkbox"/>	
Street and No. <input checked="" type="checkbox"/>	
P.O., State and ZIP Code <input checked="" type="checkbox"/>	
Postage	\$
Certified Fee	
Special Delivery Fee	
Restricted Delivery Fee	
Return Receipt Showing to whom and Date Delivered	
Return Receipt Showing to whom Date, and Address of Delivery	
<b>TOTAL Postage and Fees</b>	<b>\$</b>
Postmark or Date	

Planning Department/Dave Sikes

PS Form 3800, Feb. 1982

**CERTIFIED**  
**P 363 239 413**  
**MAIL**

PS Form 3811, July 1983

**SENDER: Complete items 1, 2, 3 and 4.**

Put your address in the "RETURN TO" space on the reverse side. Failure to do this will prevent this card from being returned to you. The return receipt fee will provide you the name of the person delivered to and the date of delivery. For additional fees the following services are available. Consult postmaster for fees and check box(es) for service(s) requested.

1.  Show to whom, date and address of delivery.  
 2.  Restricted Delivery.

3. Article Addressed to:

4. Type of Service:	Article Number
<input type="checkbox"/> Registered <input type="checkbox"/> Insured <input checked="" type="checkbox"/> Certified <input type="checkbox"/> COD <input type="checkbox"/> Express Mail	<input checked="" type="checkbox"/>

Always obtain signature of addressee or agent and **DATE DELIVERED.**

5. Signature — Addressee  
 X

6. Signature — Agent  
 X

7. Date of Delivery

8. Addressee's Address (ONLY if requested and fee paid)

DOMESTIC RETURN RECEIPT

CERTIFIED MAIL FOLLOW UP

- 0 Take a xerox copy of the green slip, white slip and the addressed envelope all on the same page (see sample, page 42)
- 0 Write the case number and date you mailed it on the photocopy
- 0 File the photocopy copy accordingly
- 0 When the white slip comes back, attach it to the photocopy
- 0 When the green slip comes back signed match it to the photocopy
- 0 Compare the article #. Once they match take the case # from the photocopy and use it to find the case file
- 0 File the signed green copy in the appropriate case file (be sure you staple the green slip to the notification letter so that later you will know which letter was sent out certified)
- 0 Once the signed green copy has been filed, you may discard the photo copy with your notes for follow-up

MARCA DEC 22 87  
 Southern California Rapid Transit District  
 15 South Main Street, Los Angeles, California 90013

CASE #  
 A1-345-86

green returned  
 1-20-88



Mr. Bernard Mullhay  
 8730 Wilshire Boulevard  
 Beverly Hills, CA 90211

PS Form 3811, July 1983

**SENDER: Complete items 1, 2, 3 and 4.**

Put your address in the "RETURN TO" space on the reverse side. Failure to do this will prevent this card from being returned to you. The return receipt fee will provide you the name of the person delivered to and the date of delivery. For additional fees the following services are available. Consult postmaster for fees and check box(es) for service(s) requested.

1.  Show to whom, date and address of delivery.

2.  Restricted Delivery.

3. Article Addressed to:  
 Mr. Bernard Mullhay  
 8730 Wilshire Boulevard  
 Beverly Hills, CA 90211

4. Type of Service: Article Number  
 Registered  Insured P 363 239 466  
 Certified  COD  
 Express Mail

Always obtain signature of addressee or agent and **DATE DELIVERED.**

5. Signature - Addressee  
 X

6. Signature - Agent  
 X

7. Date of Delivery.

8. Addressee's Address (ONLY if requested and fee paid)

DOMESTIC RETURN RECEIPT

P 363 239 466  
 RECEIPT FOR CERTIFIED MAIL  
 NO INSURANCE COVERAGE PROVIDED—  
 NOT FOR INTERNATIONAL MAIL  
 (See Reverse)

Sent to Mr. Bernard Mullhay	
Street and No. 8730 Wilshire Boulevard	
P.O., State and ZIP Code Beverly Hills CA 90211	
Postage	\$
Certified Fee	
Special Delivery Fee	
Restricted Delivery Fee	
Return Receipt Showing to whom and Date Delivered	
Return Receipt Showing to whom, Date, and Address of Delivery	
TOTAL Postage and Fees	\$
Postmark or Date	

PS Form 3800, Feb. 1982

**CERTIFIED**

P 363 239 466

Planting Department/Dave Sikes



CALCULATION OF REVISED ASSESSMENT

NOTIFICATION TO USER

Until scheduled turnover of responsibility for MOS-1 Benefit Assessment Data Base on March 31, 1988 send a copy of the CALCULATION OF REVISED ASSESSMENT form to GPC for processing (see sample, page 45)

DATA BASE REVISIONS AS A RESULT OF THE APPEALS PROCESS

See MOS-1 Data Base Manuals for information on preparation of CALCULATION OF REVISED ASSESSMENT FORM and instructions for use and routing of completed form.

CALCULATION OF REVISED ASSESSMENT

PARCEL NO. \_\_\_\_\_ APPEALS CASE NO. \_\_\_\_\_

BUILDING NAME \_\_\_\_\_

ORIGINAL ASSESSMENT \$ \_\_\_\_\_ REVISED ASSESSMENT \$ \_\_\_\_\_

<u>LAND USE CATEGORY</u>	<u>ORIGINAL SQ. FT.</u>	<u>REVISED SQ. FT.</u>
PARCEL SQ. FT.	_____	_____
OFFICE	_____	_____
HOTEL	_____	_____
RETAIL/MOTEL	_____	_____
SERVICE	_____	_____
VACANT LAND	_____	_____
PARKING LOT	_____	_____
GARAGE	_____	_____
INDUSTRIAL/WAREHOUSE	_____	_____
INSTITUTIONAL/GOVT	_____	_____
RESIDENTIAL	_____	_____
INSTITUTIONAL/LAND	_____	_____
VACANT DUE TO CODE	_____	_____
RESIDENTIAL HOTEL	_____	_____
EXEMPT/NON-PRPOFIT	_____	_____

REVISED ASSESSMENT CALCULATION:

PARCEL AREA GREATER THAN IMPROVEMENT \_\_\_\_\_ X \$.30 = \$ \_\_\_\_\_

IMPROVEMENT GREATER THAN PARCEL AREA \_\_\_\_\_ X \$.30 = \$ \_\_\_\_\_

EXEMPT IMPROVEMENT SQ. FT. \_\_\_\_\_ EXEMPT PARCEL SQ. FT. \_\_\_\_\_

ANNUAL RENEWAL CATEGORIES:

RESIDENTIAL HOTEL \_\_\_ WHOLESALE \_\_\_ VACANT DUE TO CODE \_\_\_ NON-PROFIT \_\_\_

CONDITIONS FOR CALCULATION: (attach worksheet)

CASE WITHDRAWN \_\_\_ PRO-RATION NECESSARY \_\_\_

CALCULATION NEED ADJUSTMENT \_\_\_

CHANGE IN PROPERTY STATUS:

CHANGE IN OWNERSHIP \_\_\_ NEW CONSTRUCTION \_\_\_ DEMOLITION \_\_\_ OTHER \_\_\_

PREPARED BY \_\_\_\_\_ DATE \_\_\_\_\_ ENTERED \_\_\_\_\_ BY \_\_\_\_\_

APPEALS CHANGE SUBJECT FILE

APPEALS CHANGE SUBJECT FILE

The Subject File is the complete record of Benefit Assessment Appeals Case action for each SCRTD Board Meeting.

A packet of completed and signed items is assembled for each Board Meeting and filed according to the Board Meeting date, most recent date on top.

Each Board Meeting packet should include the listed items ordered as follows:

- Overall Check list
- File Review Checklist
- Board Report
- Correction Letter (all hand written notes/calculations)
- Letters to Owners (Notifications/any other form letter)
- Resolution and Agreement (with seal and signed)

The Subject File should be cleaned up and put with the case files for final check over.

Be sure the Calculation Form has been completed and that the necessary information has been entered into the Data Base (see DATA BASE MANUALS).

Use Both the INDIVIDUAL CASE FILE REVIEW CHECKLIST (see sample, page 22) and the OVERALL CHECKLIST (see sample, page 47) to be sure all items are done.

OVERALL CHECKLIST

CASES:

SCRTD BOARD MEETING

CALCULATION FORM

Case Files

Data Base

BOARD REPORT

Board Report Notebook

Case Files (cover memo only)

Appeals Change Subject File (cover memo only)

BOARD REPORT INDEX UPDATE

Board Report Notebook

AUDITOR CONTROLLER NOTIFICATION

Case Files

Subject File

PROPERTY OWNER NOTIFICATION LETTER

Case File

Subject File (without attachments)

RESOLUTION AND AGREEMENT (with seal)

Case File (original)

Subject File (original)

District Notebook (copy)

GPC Notebook (copy)