

County of Santa Clara

Finance Agency
Controller-Treasurer

County Government Center
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Attachment I

FY2024-25 Annual Special Assessment Enrollment Timeline

5/16/2024	Annual Enrollment Workshop
5/24/2024	Annual Enrollment Instruction Letter, Form A [<i>Contact Information</i>] and Form B [<i>District Information and Exemptions Status</i>] will be sent to agencies. ^[1]
6/7/2024	New Special Assessment: Deadline for agencies with New Special Assessment(s) to contact Controller-Treasurer for new account set-up. All new Special Assessments will also need to fill out New Special Assessment Request Form . ^[1]
6/14/2024	Deadline for agencies to submit: Verified Form A and B [<i>Contact Information/ District Information and Exemptions Status</i>]; New Special Assessment Request Form for agencies with new Special Assessment; PACE Agency documents . ^[2]
6/28/2024	Form C [Annual Enrollment Form] will be sent out to agencies. ^[1] (Agencies must submit Form C with annual enrollment data file)
Early July	Change of Ownership information (for Senior Exemption purposes) is available. Contact Controller-Treasurer if such information is needed.
7/15 to 8/5/2024	Annual Enrollment Period: <ul style="list-style-type: none">• Agencies to submit the annual enrollment data file and Form C [Annual Enrollment Form]• Certification of Special Assessment Annual Enrollment will be sent to agencies for verification and signature.
8/12/2024	Deadline for <u>corrections</u> on submitted information. ^[3]
8/19/2024	Deadline for agencies to return the verified and signed Certification of Special Assessment Annual Enrollment .

[1] Letter/Forms also available for download on the Controller-Treasurer Department website: www.sccgov.org/SA

[2] PACE Agency documents: Certificate of Liability Insurance, Recorded Contracts, List of Cities/Districts enrolled in the PACE Program during the fiscal year, Indemnification and Insurance Agreement.

[3] Corrections after the deadline will be subject to charge.