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May 27, 2025

TO: ALL AGENCIES APPLYING DIRECT CHARGES TO THE TAX ROLL

The Auditor-Controller/Treasurer/Tax Collector is pleased to announce the official launch of the **San Bernardino County Direct Charge Portal**, a modern digital platform that represents a major advancement in how taxing entities submit, track, and manage annual direct charges.

Designed to enhance efficiency, transparency, and user experience, the new portal enables taxing entities to manage their submissions with greater independence and control over their direct charge data. Key features include real-time status updates, automated error reporting, and intuitive tools for navigating assessments and apportionments. These capabilities streamline the entire process—from initial submission through final certification.

This platform was developed in collaboration with **Grant Street Group**, a company specializing in software development and support for government agencies, particularly in property tax billing, collection, and distribution. The implementation of this platform is a testament to the strong collaboration between the Auditor-Controller/Treasurer/Tax Collector and Grant Street Group, whose combined efforts and expertise have been vital in advancing the County's goal of modernizing and simplifying the direct charge process.

This launch reinforces the County's commitment to innovation in public service delivery and strengthens collaboration with local taxing entities.

Attached are the **Instructions for Applying Direct Charges** to the County Tax Roll for 2025-26. Please note that submittals that do not adhere to these guidelines **will not be included** in the 2025-26 Tax Roll.

Agreement to Comply

In accordance with Section 4 of the Agreement for Collection of Special Taxes, Fees, and Assessments (Attachment E), agencies must ensure that taxes, fees, or assessments imposed and collected comply with all relevant state laws, including Articles XIIC and XIID of the California Constitution (Proposition 218). Agencies must provide evidence demonstrating compliance with Proposition 218 and other applicable laws governing the placement of fees on tax bills.

All agencies are required to sign and submit a new agreement for the 2025-26 fiscal year by mail addressed to:

San Bernardino County
Auditor-Controller/Treasurer/Tax Collector
Property Tax Division
ATTN: Direct Charge Submission
268 W. Hospitality Lane, Fourth floor
San Bernardino, CA 92415-0018

The signed agreement is an annual requirement and must be submitted prior to the submission deadline. To receive an original signed copy, please return two signed copies, and one will be returned with original signatures.

Preliminary Notification of Direct Charges

All agencies are required to complete and submit a **Preliminary Notification of Direct Charges** (Attachment C) by **July 1, 2025**, via email to ptassessments@sbcountyatc.gov.

Attachment C includes the **Direct Charge Web Portal User Access Form**, required to update agency contact information and assign user access to the Direct Charge Portal.

Timely submission ensures:

- Contact information is current for direct charge processing and apportionments.
- Proper registration of your agency and account in the Direct Charge Portal.

Please submit as early as possible to avoid delays in access or processing.

New Direct Charge Portal

The Direct Charge Portal is designed to simplify the submission of annual direct charges. Authorized users will be able to independently manage and submit charges with ease.

The portal will provide real-time notifications of file upload successes or failures and allow users to track the status of their charges as they are processed by the Property Tax team. Additionally, agencies will have access to a range of reports to assist in tracking charges.

Training

The Auditor-Controller/Treasurer/Tax Collector, in partnership with Grant Street Group, will host an online training session that covers an overview of the new Direct Charge Portal and system navigation. Each session will cover the same content. Pre-registration is required using the Zoom links below.

Training Dates and Times:

- June 24, 2025, 10:00 - 11:00 AM PT
 - [Register here](#)
- June 25, 2025, 11:00 – 12:00 PM PT
 - [Register here](#)
- June 26, 2025, 1:00 – 2:00 PM PT
 - [Register here](#)

If you have any questions on the Zoom training sessions, contact sbcdirectchargetraining@grantstreet.com.

In addition, attached is a detailed **Direct Charge Portal User Guide** (Attachment A), as well as links in the instructions to short training videos covering common portal usage and troubleshooting tips.

Submissions

The Direct Charge Portal will be open for registration from July 14 to July 18, 2025. Agencies can submit data files through the portal from July 21 to August 10, 2025. Early submission of 2025-26 Direct Charge applications is strongly encouraged.

While the use of the Direct Charge Portal is strongly encouraged for all submissions, email submissions may still be accepted under special circumstances. These submissions will incur a processing fee of \$1.20 per assessment/parcel/year sequence, along with any applicable accounting fees. Agencies must contact ptassessments@sbcountyatc.gov and provide the specific reason why the portal cannot be used for the submission to be considered.

Corrections

The Direct Charge Portal will validate uploaded files and generate a detailed report identifying any errors or warnings. Agencies are responsible for reviewing these reports, correcting any issues, and resubmitting the updated file. Once a submission is certified, no further changes can be made.

Reporting

All agencies submitting direct charges to the County Tax Roll can run and download reports on demand through the new portal. These reports are available for agencies to review their submissions before certification.

Please note that a \$27.50 fee per direct charge correction will be applied after the submission deadline.

Important Dates

Online Training Sessions	June 24 to June 26, 2025
New Agency/Account Requests	July 1, 2025
Preliminary Notification of Direct Charges including Direct Charge Web Portal User Access Form	July 1, 2025
Direct Charge Portal Registration	July 14 to July 18, 2025
Direct Charge Portal will be open to accept data files	July 21 to August 10, 2025
Submission Deadline	August 10, 2025

If you require any further clarification, please contact the Property Tax Division at (909) 382-3090 or email us at ptassessments@sbcountyatc.gov.

Sincerely,


Ensen Mason CPA, CFA
Auditor-Controller/Treasurer/Tax Collector
San Bernardino County

EM:VJD:FZ:EM:bh:wds

Attachments