

PURPOSE

Discuss the following:

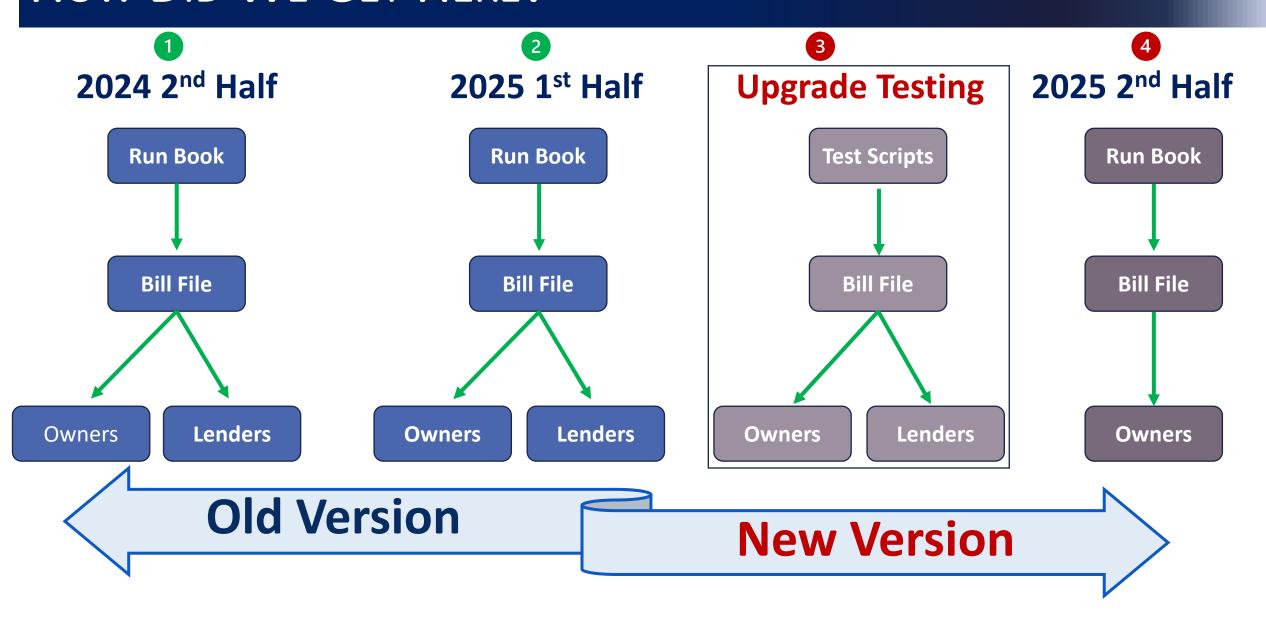
- Recent Events Related to 2025 Tax Season
- Real Estate Mailing Remediation
- Personal Property Improvements
- Modernization Efforts

2025 2ND HALF REAL ESTATE BILLING

What happened?

- Total number of bills = 75,905
- 42,951 bills sent to owners
- 33,270 bills were mailed to owners instead of the lenders.
- Bills were correct, but the mailing process did not follow the usual process.

How DID WE GET HERE?



REMEDIATION

What we did to correct the issue:

- Updated Standard Operating Procedure (SOP).
- Retrained staff
- Outreach to impacted taxpayers and Mortgage Servicers/Lenders
 - Press release
 - ○RVA.gov
 - o311 responses
 - Integrated Voice Response (IVR)
 - Call campaign for lenders

IDENTIFYING DUPLICATE PAYMENTS

How will we identify duplicate payments:

- Queries to identify duplicates
- Account analysis
- Contact taxpayer
 - Refund
 - Credit

PERSONAL PROPERTY



BILLS PRODUCED BASED ON INPUTS

Assessment Sources:

- Roll forward from prior year in system
- Department of Motor Vehicles (DMV) records

Valuation Sources:

- JD Power National Automobile Dealers Association (NADA)
- Depreciation
- Significant Older Vehicles (SIG)

IMPROVEMENTS TO PERSONAL PROPERTY BILLING PROCESS

- 2021-2023: Building and implementing RVA Pay
- 2023: Converted data from MUNIS into RVA Pay
- 2024: First annual billing in RVA Pay
- 2025: Refined the system and data
 - Data cleansing with DMV (ongoing)
 - Automated integration of DMV files and valuation sources
 - Assessments tied actual vehicle VIN at specific feature level
 - Built dashboards for quality control and performance monitoring

AUTOMATING THE PROCESS

#	Step	Past	Present
1	Roll forward data	Export from previous year into Excel	Automated roll forward within RVA Pay
2	DMV data	Merge Flat file from DMV with roll forward data file	DMV file integrated into RVA Pay directly from DMV File Transfer Protocol (FTP)
3	Assessment	NADA flat file updates to data in the file with roll forward and DMV records)	Application Programming Interface (API) for direct integration into RVA Pay
4	Upload revised data	Import revised data into MUNIS	Eliminated
5	Billing	Create bills	Automated and posted to RVA Pay Portal instantaneously.
6	Quality Control	3 rd party print vendor prints the bills and Finance staff reviewed paper bills for accuracy	Over 200 queries created to identify issues
7	Mailing	3 rd party vendor to print, upload to Invoice Cloud and mail	3 rd party vendor to print and mail
8	Credit card fees	Applicable	Eliminated

DMV Integration - Adds/ Deletes Per Year



Before: Complex Excel files, manual tracking, late billings, frequent errors



After: Push-button operation, automated assessments, timely billing



Bonus Achievement: Major data scrub updated vehicle ownership records

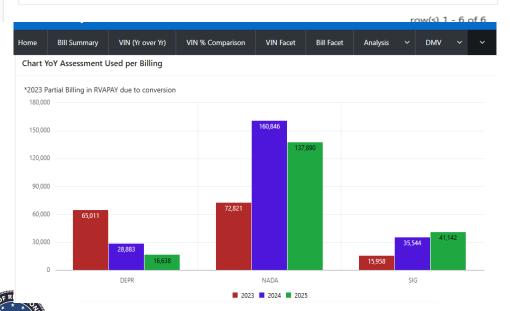


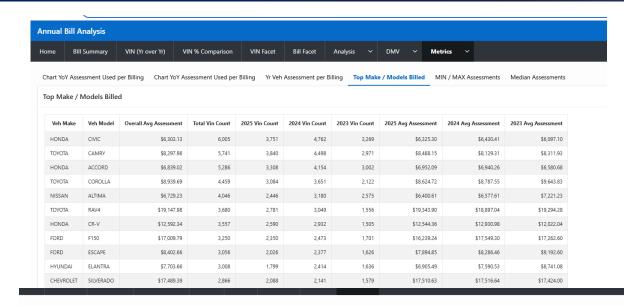
ROI: Time savings, accuracy improvements, revenue recovery

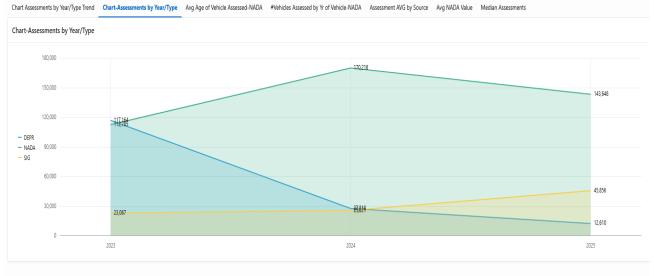
INTERNAL MONITORING OF KEY PERFORMANCE INDICATORS

Tickets by Year with YoY Changes-FY

Туре	2024	2025	Yoy Change %
Correction of Tax Record (moved, Sold, Missing Vin)	2,901	1,739	-40.1
Delinquent Account Support	768	643	-16.3
Payment Research, P&I Waiver Request	5,159	4,621	-10.4
Refund, High Mileage Assessment	3	228	7500
Routine Requests for Access, Info Update, bill copy	2,014	1,072	-46.8
	4,695	2,583	-45
Report Total:	15,540	10,886	
Download Print			







RVA BUSINESS PORTAL



EVOLUTION FROM PAPER TO PAPERLESS IN 4 MONTHS

Paper forms sent to customer

Customer mails payment or comes to city hall to pay

Customer completes paper form and mails to City

7 Manual Steps

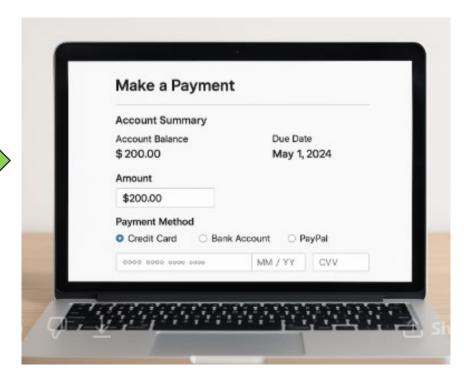
Customer receives paper bill

Staff keys information from the paper form into system

Bill file sent to print vendor for printing and mailing

System generates billing statement

Single-Point Processing



RVA Business Portal Customer Journey

Old Experience

No Visibility
Manual Renewals
Payment Challenges
Credit Card Fees
Call, Email, or Visit

New Experience

Self-Service Portal
Real-Time Account Access
Multiple Payment Options
No Credit Card Fees
White Glove Service
Book an Appointment

Competitive Advantage

Many cities still struggle with basic infrastructure

Customer Satisfaction

Measurable improvements in service delivery

CUSTOMER SERVICE IMPROVEMENTS



IMPROVEMENTS TO DATE

- Using 311 call surveys to improve experience
- Counter service experience survey (easy access by QR code)
- Bookings for scheduling on-line and in-person appointments
- Retrained staff
- All inquiries are tracked by a ticket
- Community outreach
 - District/Civic meetings
 - Community events
 - Social media
 - Media campaign
 - Targeted communication by email

DAILY METRIC REPORTS TO MANAGE CUSTOMER SERVICE

	City	of Richmond - Fi	nance Department C	umulative Daily Ti	cket Report - 05/30/25	5	
	Tax Season	Goals:	Average Number of Da	·	Percentage of Tickets	in SLA - 80%	
	Revenue Sta	ndards:	Average Number of Da	ys Outstanding - 2	Percentage of Tickets	in SLA - 99%	
	Unit	Total Outstanding	Outside of Service Level Agreement	Penalty & Interest Tickets	Average Number of Days Outstanding	Percentage of Tickets in SLA	
	Personal Property	994	664	91	20.35	33%	
	Real Estate	1510	631	58	15.42	58%	
	Business	126	48	8	9.38	62%	
	Cash Operations	30	21	4	18.70	30%	
	Delinquent Collections	56	24	20	9.34	57%	
	Tax Enforcement	0	0	0	0.00	100%	
	Payment Allocation	275	225	8	53.42	18%	
	Other	18	18	0	30.78	0%	
	Total	3009	1631	189	20.28	46%	
			Going Out	of SLA			
	Business	Delinque	ent Collections	Person	al Property	Cash Operation	S
/31/2025	3	5/31/2025	6	5/31/2025	42	5/31/2025	
5/1/2025	0	6/1/2025	1	6/1/2025	9	6/1/2025	
6/2/2025	0	6/2/2025	1	6/2/2025	7	6/2/2025	
6/3/2025	0	6/3/2025	2	6/3/2025	12	6/3/2025	
	Real Estate	Payme	nt Allocation	Tax En	forcement	Other	
/31/2025	45	5/31/2025	12	5/31/2025	0	5/31/2025	
5/1/2025	3	6/1/2025	0	6/1/2025	0	6/1/2025	
6/2/2025	1	6/2/2025	0	6/2/2025	0	6/2/2025	
6/3/2025	6	6/3/2025	0	6/3/2025	0	6/3/2025	

		Daily Ticket	Activity		
Unit	Start of Day	Added	Closed	End of Day	OOSLA
PP	926	145	107	964	634
RE	1371	130	28	1473	566
BU	117	41	28	130	66
co	26	1	0	27	12
DC	61	18	28	51	22
TE*	0	0	0	0	0
PA	267	6	0	273	176
Total	2768	341	191	2918	1476

		Waiting On:		
	Refund			
End of Day	Check	Customer	Team	Notes:
964			964	
1473			1473	
130			130	
27			27	
51			51	
0			0	
273			273	
2918	0	0	2918	



CULTURAL TRANSFORMATION

Performance Metrics Trend

Difficult Decisions

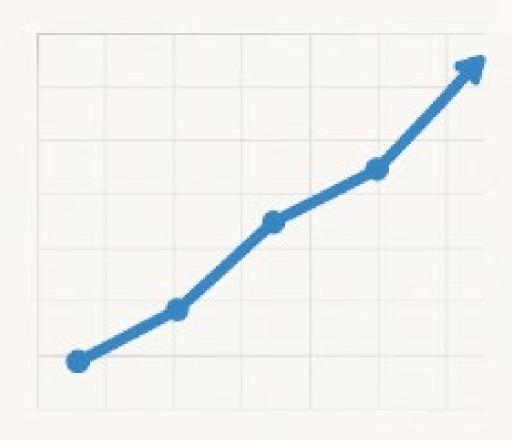
Addressing poor performance and negativity

Courage Required

Taking risks to implement necessary changes

Results

More positive, performanceoriented culture emerging



2020 - 2024 Building the Foundation

Where We Were

- Required disclosures due to history of late external audit
- Numerous significant external audit findings since 2015
- Non-Compliance with Virginia
 Department of Transportation reporting requirements
- ERP out of support (no technical support and out of extensions on contract)
- MUNIS out of support since 2017 (no technical support)

Where We Are

- No disclosure requirements maintained (5 years)
- Removed numerous outstanding significant external audit findings (4 years)
- Compliance with Virginia Department of Transportation reporting requirements (2 years)
- ERP current version and regular maintenance
- MUNIS upgraded to current version
- RVA Pay live for Personal Property

2024 - 2025 ORGANIZATIONAL DEVELOPMENT

Where We Were

- Unrecorded Business Filings
- Paper based records
- Manual processes
- Intermittent system outages
- Little to no Standard Operating Procedures
- Little to no policy adherence
- No line of sight for performance management
- No line of sight to measure customer experience
- No formalized training or professional development

Where We Are

- Filings recorded timely
- Paperless systems being developed
- Automation of manual processes
- Stable systems
- 70 SOPs created (Total of 76 identified)
- Line of sight to Policy adherence
- Direct line of sight for performance management
- Direct line of sight to measure customer experience
- Formalize targeted job training and professional development

2025 - 2026 DATA ACCURACY AND AUTOMATION

- KPMG contracted to perform a forensic audit of all business accounts
 - Forensic audit complete
 - Implementation of recommendations in process
- Build out RVA Pay Business Portal features
 - Business Personal Property (BPP),
 - Business, Professional and Occupational License (BPOL),
 - Admissions, Transient Lodging, Occupancy, and Meals Tax (ATOM)
- Design, develop, and implement remaining RVA Pay modules:
 - Real Estate
 - General Billings

CULTURE: PAST, PRESENT, AND FUTURE

Past

- Fear of and Resistance to change
- Competency challenges
- Passing the blame
- Reliving past failures
- Lack of training
- Lack of professional development
- Accountability
- Cliques
- Secrecy and sabotage
- Silos of information
- Diminished professionalism
- Lack of urgency
- Personality based work completion

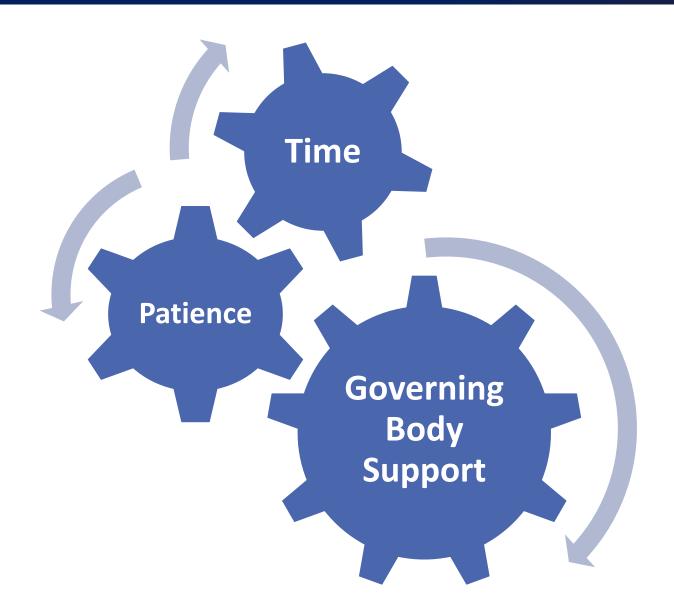
Present

- Cohesive team environment on 10th floor
- Continued challenges in competency in Revenue Administration
- Job specific training provided
- Professional development provided
- Minimized silos of information
- Standard of professionalism communicated and expected
- Customer focused work
- Performance and issue resolution time is monitored
- Performance issues addressed timely
- Pockets of resistance to adherence of core values
- Pockets of cliques still exist
- Pockets of secrecy and sabotage

Future

- Culture of excellence adhered to by all employees
- Highly competent and trained staff
- Certified offices by the Commissioner of Revenue and Treasure's Associations
- Team environment
- Right people in the right seats

FUTURE IS BRIGHT

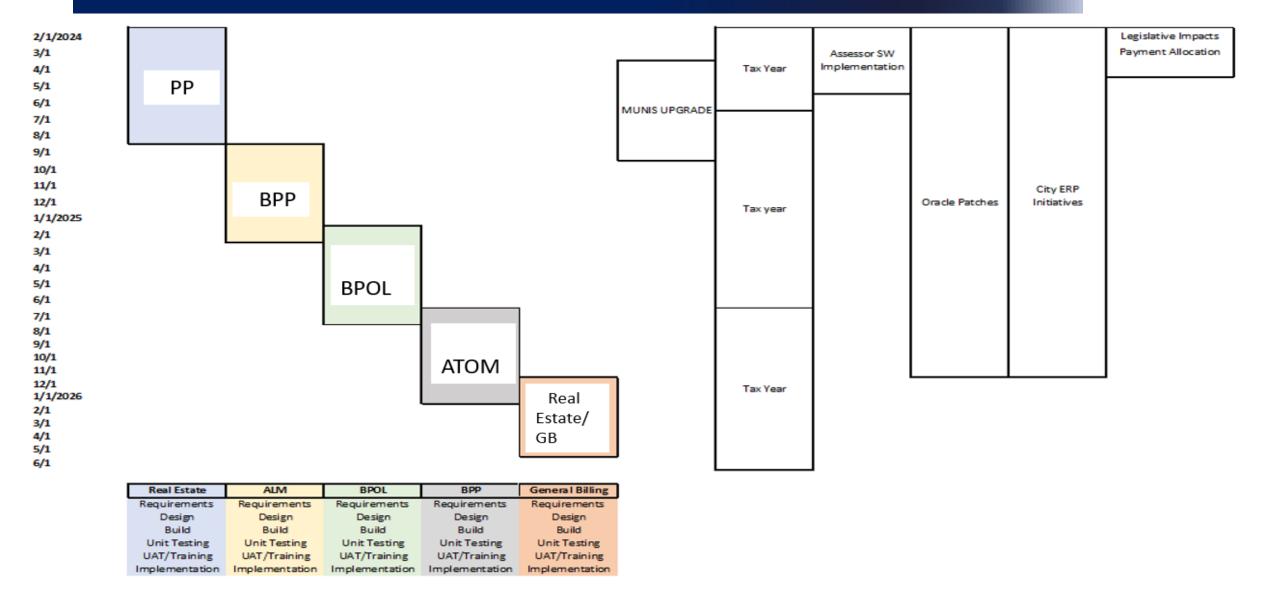




APPENDIX



RVAPAY/RVA BUSINESS PORTAL TIMELINE



CORERP/RAPIDS ROADMAP



FINDING	ACTIONS REQUIRED	STATUS
1 Front Line Staff - Customer Service Staff Deficiencies	Coaching and performance management being provided to raise bar and/or managing staff. Training for	
a sleeping at desks	front line on customer service reps. Provided scripts for acceptable standard customer responses in SOP;	Complete
b phone/ear bud use during work time & at customer service counter	Directive for food/ lunch, breaks to be taken in the break room. Directed Supervisors/Managers to monitor	Complete
c unpermitted "breaks" and time away from workstations	and manage staff performance with accountability (work hours to productivity metrics, customer service skills,	Complete
d unprofessional dress violating Policy (hoodies, sweatpants)	dress code and office standards, drama diffusion, accountability for poor services).	Complete
e eating at desk /front counter	tress code and office standards, draina diffusion, accountability for poor services).	Complete
f unserviced 311 tickets closed by staff without working		Complete
	Culture Rollout Re-boot to align to Guiding Principles of PACT; Evaluation tool added to workplan to include	UPDATE: Culture Rollout Complete; Ev
g poor communication skills; unprofessional conduct with customers & supervisors h attitudes and drama quotient very high in Business unit	PACT and customer centric focus to align to "Guiding Principles".	Revamp 12-15-24
i no metric for processing expectations	Metrics reporting added to workplan meetings and in daily 311 metric report to Director	Complete
The matter of processing expectations	The state of the s	Complete
2 Supervisors / Managers - Lack of Workplans to Organize & Direct Work	Created comprehensive written workplans for all duties, assignments, and projects documenting related	Complete
	deadlines, priorities, and performance metric requirements.	
3 Service Continuity Vulnerabilities:	Training Videos, SOP's, skills assessments of staff and hiring to fill vacancies.	
a Undocumented work processes	SOP's Menu with development plan; Rollouts to staff with signatures for training	UPDATE: 80% Complete; 12-15-24
b Limited skills of staff - business unit	Hiring plan with training sessions and SOP's deployed; poor performers addressed; rebuilding unit.	Complete
c Limited transition of knowledge - business unit	SOP's and videos created; staffing alignment and cross Unit staffing support ongoing	Complete
d Silo'd unit walls to address workloads	Workload now distributed across Units no walls; overtime where required	Complete
a sing a lift trains to a data ass from the same as		55
Work Status & Backlogs Not Disclosed by Management/Supervisors		
a Unmonitored e-mail boxes; no response provided (7,000ish)	ALL work into 311 tickets /forms for trackable line of sight & metric reporting. Redirect message to 311.	Complete
b Unmonitored voicemails no response provided (6 months?)	ALL work into 311 tickets /forms for trackable line of sight & metric reporting. Redirect message to 311.	Complete
c Business & Personal Property Unit - significant backlog of work not disclosed	Desk audit of 1st floor to identify work pending; 1,001 unworked Business documents discovered	Complete
	unorganized, unfiled, unsecured throughout the unit. 716 unprocessed mail records in Personal Property in	
	box under desk. Metric count documented and an SOP created with workflow controls to manage forward.	
d 311 Service Tickets not addressed (up to 8 month backlog - 3400ish in Personal Property	Assigned staff across units; created metric counts hourly & implemented performance management;	Complete
a service in the service (up to o months) and the service in the service (up to o months) and the service in the service (up to o months) and the service in the service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) and the service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) and the service (up to o months) are service (up to o months) ar	monitored and trained staff; created SOP & customer escalation process; mandatory OT when out of SLA;	Complete
	New SOP standard of 5 business days SLA	
e no metric for processing expectations - staff performance not addressed	Metrics per hour have been developed for each tax type; reported out in workplan meetings and in daily 311	Complete
to metre for processing expectations start performance not addressed	metric report to Director	Complete
5 Deficient Work Processes Limiting Accurate & Timely Service Delivery	Automation of processes into 311 digital tickets/forms underway; Data scrub project after all work backlog	
a Number of State of	processed with quality review.	UPDATE: Full software automation pla
a Numerous manual and paper processes	SOP WPI plan; reviewing EVERY task; automation projects identified & added to workplan.	-
		development; Business submission
h. Outday of frances of the investment	SOR USE also assistante Exercised assistantified 8 added to conducte	automation for 25' deployed
b Outdated forms needing improvement	SOP WPI plan; reviewing EVERY task; projects identified & added to workplan.	UPDATE: 90% Complete; 12-15-24
c Lack of Quality Control Reviews to Catch Staff Errors	SOP WPI plan; reviewing EVERY task; project to review backlog added to workplan.	UPDATE - Complete
d Poor data integrity prohibited accurate and timely service in Business Unit	Data scrub project for Business in workplan; 604 Business audit project; Re-org w/ Control Unit (audit)	UPDATE: Scrub in progress; 12-15-2
e Numerous work around processes due to years of poor decisions/actions	SOP WPI plan; reviewing EVERY task; projects identified & added to workplan.	UPDATE: Workplan developed with
		delivery dates; numerous solutions
		deployed
Poor Mid-Management Decisions Resulting In Inaccurate Data & Untimely Work	Reorg of Division; daily activity involves Director; Regular touch base meetings for status, direction,	UPDATE: New leadership hired; backfi
- ·	coaching of team; Workplans tracking all issues identified	positions in progress
 RVAPay software implementation decisions resulting in account errors. 	Project re-assigned; tracking & daily status meetings, SME collaboration to correct issues.	Complete
b Personal Property not billed timely (22' & 23' supplementals, 23' & 24' delinquents)	Workplan tracking with deadlines. Regular reports with Director ling of sight to all activities /due dates.	UPDATE: 1-15-24
c Personal Property DMV updates not processed to update records (17' forward)	Workplan tracking with deadlines. Regular reports with Director ling of sight to all activities /due dates.	Complete
d MUNIS System upgrades (4) not performed diminishing performance.	Workplan tracking with deadlines. All upgrades to be complete in Dec. 24'	12-31 Due Date
e Poor staff recruitment and promotions; staff lacking critical thinking skills.	Hiring practice coaching & interview questions provided; Director micro-managing ALL HR Actions New hire enhancing BRT for comprehensive trainings.	Complete
f No new hire onboarding plan resulting in wasted resources and errors. No quality control review of staff work presenting questionable system information.	New hire onboarding PPT for comprehensive trainings. OC plan implemented to include workpaper documentation.	UPDATE - Complete
g No quality control review of staff work presenting questionable system information. Business (200) assessment (201) 8-23() assigned false filing date for killing and presented as	QC plan implemented to include workpaper documentation	UPDATE - Complete
h Business (BPP) accounts (22' & 23') assigned false filing date for billing and processed as	Data scrub project underway to assess depth of issue and corrective actions if needed. Dark and the floor to identify work pending. Created workflow controls to manage forward.	UPDATE - Complete
i Discovered bills printed & not mailed (PPT 24', BL 22' & 23', BPP filing, Daily Rentals)	Desk audit of 1st floor to identify work pending; Created workflow controls to manage forward.	UPDATE - Complete
 j Discovered various business forms not processed (no count or organization of work). k Discovered mail not processed in Personal Property. 	Desk audit of 1st floor to identify work pending: Created workflow controls to manage forward. Desk audit of 1st floor to identify work pending: Created workflow controls to manage forward.	UPDATE - Complete
k Discovered mail not processed in Personal Property.	Desk audit of 1st floor to identify work pending; Created workflow controls to manage forward.	UPDATE - Complete

MANAGEMENT & SUPERVISION TOOLS

- ✓ Gantt Chart work "line of site" to deadlines
- ✓ Workplans all units (communicate focus, work, lead staff, deadlines, notes
- ✓ Metric tracking (cumulative daily ticket reports, ticket closure reports, customer SLA's)
- ✓ Staffing plans (focus resources, monitor productivity, develop due dates)
- ✓ Leadership meetings Review workplans & assess risk
- ✓ Daily team stand-ups
- ✓ Unit teams tax chat channels

GANTT OF DIVISION FOR LINE OF SITE OF DUTIES

	d Tax Revenue Division GHANT Chart																																			
Update: 5	5/29/2025		Legend Colo			Estate																														
				Busness PPT	Del (
LINUT	TASK		JANUARY	Cash Ops		FEBRUARY			MARCH			APRIL			MAY			UNE			JULY			AUGUST		cri	TEMBER			OCTOBER			OVEMBER			ECEMBER
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		form notice					3/:	1								due 6/5																				
	Annual BPOL Renewal	email filing					na	wment																												
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F	PPTRA % Calculation & Council Approval		Prepare Council																																	
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	Monthly PPT Supplemental Billing (Prior		N payment												payment		invoice				payment			oice paymer		invoice	payment			e payment			payment			e payment
,	Month)	File (Di activity	c due 15th											May DMI File of	V due 15th		print/mail of by 15th	due 15th		print/n by 15th	nail due 15th			nt/mail due 15 15th	ith	print/ma 15th	l by due 15th		by 15t	mail due 15th th		print/n by 15ti	nail due 15th h		print/m by 15th	mail due 15th h
		invoice print/r			Fe	eb & March DMV I	File (Jan-Feb a	ectivity) Run wi	ith Annual Bills					Supplint	s																					
		by 15t												print/ma by 15th	il																					
	Annual Posting of Property Tax File to Web													by 15th					Uplo	ad to																
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DEAL S	ESTATE																		· Orta																	
	Annual Tax Relief Program Applications			application									re	minder												reminder										
				print/ mail by 1/30									m	illing to plicants												mailing to applicants										d 1
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Workplan to Track Progress and Guide Units

•	Richmond - Finance Department, Revenue Division							LEGEND:	BLUE =	Data entry required
								ELGEND.	DECE	Data cita y required
	Property Unit		m. n.	G 1.41	0/ 0 1.4.	G	D . D. (4 1 1 m	SOP Ref	Phr. d
asi opuaie.	3-20-23 by No		To Be Processed	Completed	% Complete	Count / Remaining	Due Date	Assigned To:	Link	Notes:
Count	Personal Property Billing:				•		•		•	
	25' PPTRA Rebate % Rate Calculation		1	1	100%	-	1-Feb	Billing Mngr	#	Provide VIN # & Value after Jan DMV file run to Jeff for PPTRA cald
	25' Tax Year Billing, Mailing & Public Advertisement		1	1	100%	-	15-Apr	Billing Mngr	#	Bill mailing by 4-22 to meet 45 day billing window before 6/5 due da
see 25 PP Billing Tab	25' Delinquent Billing		1	0	0%	1	August	Billing Mngr		Bill in July with 30 day billing window
	24' Delinquent Billing (Remaining VIN's on Billing Calndr tab)		1	0	0%	1	August	Billing Mngr		DMV Scrub Project
	PY Tax Correction Billing (Clean up Billing per Billing Calndr tab)		3	0	0%	3	July	Billing Mngr		DMV Scrub Project
	DMV File Download/Upload/Run/ Manual Exclusion Exception Clearing (4 Weekly & 1 Monthly	7)							#	
	January (Dec Weekly + Monthly Data) - included in Annual Billing		5	5	100%	-	7th Monthly	Sue / Supvsr		
	February (Jan Weekly + Monthly Data) - Included in Annual Billing		5	5	100%	-	7th Monthly	Sue / Supvsr		
	March (Feb Weekly + Monthly Data) - Included in Annual Billing		5	5	100%	-	7th Monthly	Sue / Supvsr		
	April (March Weekly + Monthly Data) - Included in Annual Billing		5	5	100%			Sue / Supvsr		
	May (April Weekly + Monthly Data)		5	5	100%			Sue / Supvsr		
	June (May Weekly + Monthly Data)		5	2	40%	3	7th Monthly	Sue / Supvsr		
	6 Month June True Up File		1	0	0%	1	July Annually	Sue / Supvsr		
	Supplemental Billing & Mailing - DMV Monthly File (Prior Month Data)		-		0,0	-		Suc : Sup : Si	#	
	Feb - April in the Annual Billing (Jan - March Data)		3	3	100%	_	15th Monthly	Billing Mngr		
see 25 PP Billing Tab	May (April Data)		1	0	0%	1	15th Monthly	Billing Mngr		
onling 1ao	June (May Data)		1	0	0%			Billing Mngr		
	25' Personal Property Rollbook - Annual Posting		1	0	0%			Billing Mngr	#	
	3						,	8 8		
	Revenue Progress	As of:	Tax Levy	Budgeted	Collected	Levy	Budgeted		#	
						Collectecd	Collected			
	25' Annual Billing	5/28/2025	\$65,025,808	£42 021 820	60	00/	00/			
	25' Supplemental YTD	Date	\$0	\$43,921,839	\$0	0%	0%			
	25' Motor Vehicle Licenses	Date	\$0	¢8 402 000	60	#DTV/01	00/			
	25' Motor Vehicle Licenses YTD (Supplemental)	Date	\$0		\$0	#DIV/0!	0%			
	25' Delinquent Billing	Date	\$0	\$9,890,886	\$0	#DIV/0!	0%			
	Ticket Metric Reporting	As of:	Open Tickets	OOSLA	% SLA	Waiting On Refund, Transfer	Waiting on	Waiting on	Cross	
		5-27-25			Compliant	or P&I Process	Customer	Team	Check of	
							Contact		Formula	
	In Process		371	356	4%	340	19		= 371	
	Assigned / Not Started		389	0	100%	0	0		= 389	
	Total:		760	356	53%	340	19	401	760	
	as Tracking:					Origin Date		Assigned To:	Status	
	Lease Vehicle Accounts Reconciliation (LK assigned to Dan Rhodes SOP)					8/24	TBD	Marlo		
2	SOP Development & Update					6/24	TBD	LK		
3	Penalty and Interest Ordinance change SR					8/24	1/1/2025	Raj / Bonita	Complete	•
1	Membership Agreements Admin (JD Power / DMV Access / Game & Inland Fish)					7/24	Annually	PP Supvsr		

Work Process Improvements

✓	Poli	cies, SOP's & Quality Controls (mail room, tickets, email/vm shut down, standard communications)									
	✓	✓ SOP's linked to Unit Workplan Activities									
	✓	311 Customer Service Ticket Tracking - line of sight to pending work & training needs									
	✓	✓ Customer Service Standards									
	✓	✓ White Glove & Ambassador Service Stations									
	✓	✓ Staff Productivity Metrics									
	✓	Quality Control Reviews (Q&A, Coms Templates for CustSvc, QC & Documentation Standards)									
✓	Tecl	hnology Upgrades & Development:									
	✓	Process Automation Is Transformational to Customers & Staff Development									
	✓	RVAPay Design Build Gives SPEED TO SOLUTIONS									
	✓	Line of Site into Work with Dashboards									
	✓	Real Time & Transparent Customer Service									
	✓	Document Management (Customer Attachments, Scan of mail to Account Tickets, Docusign Approvals, Digital Forms)									
✓	Cus	tomer Service Survey Feedback									

DOCUMENTED SUBJECT MATTER KNOWLEDGE SHARING



8' LIS are mailed 1 time per year NLT 4/22 and due 6/5 for 45 day advance bill requirement per City Code. A *IT* te off of \$5 or less is part of process.

.F.MENTAL BILLS are to be processed monthly after annual billing process and by 15th of month with 45 day note bill requirement per City Code.

JNQUENT BILLS are sent shortly after the original billing due date providing 30 days from mailing date as due date.

Line suppress for \$20 or less (and never refer to TACS for \$20 or less.) TACS referral occurrs 6 months after the DQ bill due date.

SPECIAL BILL GENERATION is performed by restricted access staff members for adjustments only and Bill Type "7" in RVAPay (supplemental) where the customer "cannot" wait for the monthly supplemental bill generation process.

- 5 Taxation IN STATUTE is permitted for current calendar year (CY) plus 3 back years (prior than this are OOStatue unless sent to TACS Collection)
- 7 A small balance WRITE OFF is done for CRedit and DR (debit) balances of -\$5 to +\$5 for billing efficiency.
- 8 A "REDISTRIBUTION" of CR balances over \$5 is performed from the oldest year consecutively to the CY to reduce any balances due as part of billing. No redistribution of CR balances applies to leased vehicles.
- 9 BILL MAILING: A 3rd Party Billing Vendor, DataMatx, is used for bill mailing. They use NCOA to redirect any bad addresses & share impacted address file (post to e-trax) for RVAPay system update notice to development team. These addresses are to be placed into the "temporary address field" for use until a DMV match address appears. Need to automate this as currently requires advisement to developers to process.

Delinquency:

- 1 TACS is City 3rd party DELINQUENT VENDOR. Customer accounts are flagged (DSO, Bankruptcy, TACS) via parameter selection by DC when referred to TACS. A monthly file is received from TACS to report account payments/status via the payment file portal (Nina in Cash Ops processes). Flag is removed automatically once zero balance is met.
- 2 If the customer accounts is in DSO, payment can be made online.
- 3 If the customer account is in TACS or Bankruptcy, account holders cannot make payment through the customer portal. At login, customers will find that the Add to payment button is greyed out. They would select "Tab missing" as the 311 ticket category and create a ticket for assistance.
- 4 TACS referral should occur only after original bill + 1 delinquent bill + 6 months.
- 5 TACS referral of \$20 balance due or higher ONLY.
- 6 \$30 Admin Fee applies per ACCOUNT (not VIN) per YEAR for delinquency.
- 7 TACS flag reconciliation should be performed annually to confirm status of RVAPay flags.
- 8 1/1 Write Off of Bal Due accounts is to occur for OOStatute year (unless sent to TACS which SB the case).

exation Processing Rules:

- 1 DMV DATA IS THE OFFICIAL SOURCE for billing and account adjustments (address, Move In/Out, Disposition dates, etc.) Customer driven requests must be verified to the DMV system record BEFORE processing any RVAPay edits. IF the DMV record does not reflect the data advised by the customer, staff must redirect the customer to go to DMV to update their record such that it can be confirmed in the DMV system by staff before the City can make any bill or account adjustment.
- DMV RECORD UPDATES: DMV provides a weekly (move in's/addresses) and monthly (ALL activity) file for immediate download fr DMV, upload to RVAPay, and run with confirmation by the PP Supervisor of timeliness of actions to the evenue Manager, Program & Ops Manager. There is an "Exceptions" file that is produced from each DMV upload that

15 Years of Leadership Turnover (CAOs, DCAOs, and Finance Directors)

