



County of Sacramento

September 15, 2025

To: Direct Levy Districts

Subject: **FISCAL YEAR 2025-26 DIRECT LEVY PROCESS IN TAXSYS AFTER ANNUAL ROLL**

Effective September 15, 2025, our office has transitioned to our new Property Tax System ("TaxSys") which will be used for the remainder of Fiscal Year (FY) 2025-26 and for future years. This has been a significant effort over the last three years in order to replace our decades old platform responsible for collecting and distributing more than \$3 billion in annual tax revenue for the County, cities, school districts and special districts.

There are a variety of benefits to the new system for residents, taxpayers, and public agencies. One key benefit is that this new system provides a new capability for Direct Levy Districts to be able to administer their own uploads of direct charges and submission of roll changes and corrections, subject to certain limits.

As a result, the after annual roll process for FY 2025-26 will now be completed through our new levy portal. **Before creating a portal user account, please complete the attached form to indicate the appropriate access level for each user within your agency.** We request you submit this by email to finance-directlevy@saccounty.gov. Once the form has been submitted to our office, you may then follow the instructions below to create your user account and password for the portal.

Training Videos

The links below provide training videos on how to access and use our levy portal. Please refer to them for initial guidance on how to use the portal:

- Basic Features - <https://youtu.be/lhXZD9b54wY>
 - This includes requesting access to existing subagencies, requesting a new subagency, viewing reports and managing subagency contact information.
- Making Corrections - <https://youtu.be/KnXUMKq8VQg>
 - This covers uploading correction files and viewing the error reports.

Create a New Portal User

1. Visit taxentityportal.com/sacramento
2. Click "Log In" at the top right of the screen.
3. First time logging in:
 - a. Option 1: Create an account using your work email and password by clicking "Sign Up".
 - i. Enter email, password, first name, last name and click "Register".
 - b. Option 2: Use a Google, Apple, or Facebook (if used by your agency).
 - c. When prompted, enter the email address and password as part of this signup.
4. Subsequent logins:

- a. Option 1: Enter email and password and click "Sign In".
- b. Option 2: Use Google, Apple, or Facebook to log in.
5. You will be redirected back to taxentityportal.com/sacramento

Upload Direct Charge Correction Instructions

The below instructions describe the steps necessary to upload a direct charge correction once logged into our levy portal:

1. Navigate to "Upload/Manage Current and Prior Rolls" and find the subagency you need to upload a file for.
2. Click "Upload/Manage" and upload the Direct Charge corrections file.
 - a. Direct levy numbers are also specified in the record details.
 - b. Any record with a direct levy number that does not match the selected one will error.
3. The system will validate and load the file.
 - a. You will receive an auto-generated email from the system when the load completes. Processing time will take a few seconds to several minutes, depending on the number of records in the uploaded file.
 - b. If the file is rejected, you will receive an email detailing the error. The system will reject the file for the following errors:
 - i. Invalid file format
 - ii. Invalid records (i.e. too many fields)
 - iii. Invalid data format
 - iv. Invalid subagency status
 1. Subagency is not approved.
 2. County has unapproved the subagency for the year.
 3. Invalid direct levy number, or user is not approved for the code.
4. If the file passes processing:
 - a. View reports of the accepted and rejected records:
 - i. Number of accepted records
 - ii. Number of unaccepted records and reasons they were not accepted
 - b. Accepted records are processed immediately by the system and bills are updated

Note: Sacramento limits the number of portal corrections to 250 per month per direct levy. If you have corrections required in excess of this, please contact us for assistance.

Electronic Data Specifications for Special Assessments

The below instructions describe the required file format necessary for your file to be able to successfully upload to our levy portal:

Direct Charge Correction File Specifications

- Each file must be limited to a single subagency (Direct Levy Number) code. You may upload multiple files per subagency, as needed.
- Fields must be comma-separated.
- Each levy record must consist of the following fields, in order:
 - Parcel Number (14 digits)
 - Assessment Year (Numeric, 4 digits)
 - Agency Account Code (4 characters, ex. 0277)

- Prior Total Charge Amount (Decimal)
- New Total Charge Amount (Decimal)
- A header row is **required**. It should contain:
 - parcel_number, assessment_year, code, prior_total_charge_amount, new_total_charge_amount

Note: Direct Charges must be uploaded using a comma-separated value (CSV) file format.

Example File Format

*parcel_number, assessment_year, code, prior_total_charge_amount,
new_total_charge_amount*

204-0142-004-0000,2025,0277,721.28,750.98

204-0181-010-0000,2025,0277,873.3,876.32

204-0274-011-0000,2025,0277,1133.04,1000

Contact Information

If you have any questions, please do not hesitate to contact us via email at finance-directlevy@saccounty.gov or call Menchie Rona-Salzberg, Accounting Manager, Tax Accounting Bureau at (916) 874-8011.

Sincerely,



Chad Rinde
Director of Finance

cc: Sylvester Fadal, Deputy County Executive
Christina Wynn, Assessor
Poonam Aujla, Assistant Auditor-Controller
Laura Jacobson, Assistant Tax Collector
Peter Aw-Yang, Assistant Treasurer

DATE STAMP HERE

COUNTY OF SACRAMENTO
DEPARTMENT OF FINANCE
AUDITOR-CONTROLLER DIVISION
SIGNATURE OF LEVY PORTAL LEVEL ACCESS

Full Name of Portal User	Email Address of Portal User	Direct Levy Number/Name	Access Level (Read Only / Read/Write)

DISTRICT APPROVAL:
I have read and understand the Fiscal Year 2025–26 Direct Levy Access Level Agreement, which outlines the terms, conditions, and responsibilities related to user access for the Portal. I acknowledge and approve the access levels (Read Only or Read/Write) assigned to the individuals listed by our agency. I agree to the terms and conditions stated therein and affirm that all designated users are authorized to act on behalf of the agency for the purposes of managing direct levy data and subagency access.

AGENCY NAME: _____

Department/Division: _____

Authorized Signature: _____ Date: _____

Title: _____

Dept of Finance - Auditor-Controller Division Use

Update CHECKLIST and DT Screen:By: