

## ASSESSMENT FORMS AUTHORITATIVE CITATIONS

The following provides the authoritative citations for the Assessment Forms Survey Topic. In general, citations include Constitutional provisions, sections of the Revenue and Taxation Code, other applicable statutes, court cases, Property Tax Rules, *Assessors' Handbook Sections*, Letters To Assessors, and legal annotations pertaining to the topic.

CITATION	DESCRIPTION
<b>Government Code</b>	
<a href="#"><u>§15606</u></a>	The BOE has the duty to prescribe rules and regulations for assessors and local boards of equalization, to prescribe and enforce the use of property tax forms, and to prepare and issue instructions to assessors to promote uniformity throughout California.
<b>Property Tax Rules</b>	
<a href="#"><u>Rule 101</u></a>	Property tax forms approval procedures for board-prescribed exemption forms.
<a href="#"><u>Rule 171</u></a>	Property tax forms approval procedures for board-prescribed report forms and property statements.
<b>Letters to Assessors</b>	
<a href="#"><u>2004/049</u></a>	An assessor may not use locally developed forms if there is a board-prescribed form available.
<a href="#"><u>2013/015</u></a>	Approval of Property Tax Rules 101,171, 252, and 1045, effective April 1, 2013.

## ASSESSMENT FORMS

	Number	Rev	Date	Classification	R&T Code §	Confidential	On Auxiliary Site	Title
√	58-AH	16	05/14	Prescribed	63.1(e)(1)	Yes	Yes	Claim for Reassessment Exclusion for Transfer Between Parent and Child
√	58-G	14	05/14	Prescribed	63.1(e)(1)	Yes	Yes	Claim for Reassessment Exclusion for Transfer From Grandparent to Grandchild
√	58-H	01	12/12	Prescribed	62.3	No	Yes	Affidavit of Cotenant Residency
√	60-AH	15	05/13	Prescribed	69.5(f)(1)	Yes	Yes	Claim of Person(s) at Least 55 Years of Age for Transfer of Base Year Value to Replacement Dwelling
	60-NR	03	02/08	Prescribed	69.5(i)	Yes	Yes	Notice of Rescission of Claim to Transfer Base Year Value to Replacement Dwelling
√	62	14	05/13	Prescribed	69.5(f)(1)	Yes	Yes	Disabled Persons Claim for Transfer of Base Year Value to Replacement Dwelling
	62-A	04	08/10	Prescribed	69.5(f)(1)(B)(i); 74.3(f)(1)	Yes	Yes	Certificate of Disability
	63	03	02/08	Prescribed	74.3	No	Yes	Disabled Persons Claim for Exclusion of New Construction
√	63-A	03	02/08	Prescribed	74.6(g)	No	Yes	Claim for Disabled Accessibility Construction Exclusion from Assessment
√	64	10	02/11	Prescribed	74.5(d)	No	Yes	Claim for Seismic Safety Construction Exclusion from Assessment
√	64-SES	02	05/12	Prescribed	73(e)(2)	No	Yes	Initial Purchaser Claim for Solar Energy System New Construction Exclusion
√	65-CP	02	08/07	Prescribed	69.4(f)(3)	No	Yes	Claim for Transfer of Base Year Value from Qualified Contaminated Property to Replacement Property
√	65-P	04	06/11	Prescribed	69.3(e)	No	Yes	Claim for Intracounty Transfer of Base Year Value to Replacement Property for Property Damaged or Destroyed in a Governor-Declared Disaster
√	65-PT	06	01/12	Prescribed	69.3(e)	No	Yes	Claim for Intercounty Transfer of Base Year Value to Replacement Property from Principal Residence Damaged or Destroyed in a Governor-Declared Disaster
	66-A *	02	05/15	Recommended	534(d)(1)	No	Yes	Notice of Enrollment of Escape Assessment [Counties without Section 1605(c) provisions]
	66-B *	02	05/15	Recommended	534(d)(1)	No	Yes	Notice of Enrollment of Escape Assessment [Counties with Section 1605(c) provisions]
	67-A **	04	05/15	Recommended	75.31(g)	No	Yes	Notice of Supplemental Assessment [Counties without Section 1605(c) provisions]
	67-B **	03	05/15	Recommended	75.31(g)	No	Yes	Notice of Supplemental Assessment [Counties with Section 1605(c) provisions]

\* County-developed form must be submitted and approved by BOE Forms Coordinator pursuant to Revenue and Taxation Code section 534.

\*\* County-developed form must be submitted and approved by BOE Forms Coordinator pursuant to Revenue and Taxation Code section 75.31.

√ These forms have been adopted by the Board, after consultation with the CAA Forms Subcommittee. Beginning in 2013, county assessors will no longer be able to "rearrange" these forms.

	Number	Rev	Date	Classification	R&T Code §	Confidential	On Auxiliary Site	Title
	68	05	08/07	Prescribed	68 Rule 462.500	No	Yes	Claim for Base Year Value Transfer—Acquisition by Public Entity
✓	121	02	01/10	Prescribed	672	No	Yes	Statement of Financial Interest
✓	231-AH	19	05/15	Prescribed	254	No	Yes	Welfare Exemption/Section 231 Change in Eligibility or Termination Notice
✓	236	06	05/12	Prescribed	254	No	Yes	Exemption of Leased Property Used Exclusively for Low-Income Housing
✓	236-A	09	05/12	Prescribed	254	No	Yes	Supplemental Affidavit for BOE-236, Housing—Lower-Income Households
✓	237	03	02/08	Prescribed	254	No	Yes	Exemption of Low-Income Tribal Housing
✓	237-A	03	06/12	Prescribed	254	No	No	Supplemental Affidavit for BOE-237 Housing—Lower-Income Households
	260	09	06/11	Prescribed	217	No	Yes	Certificate and Affidavit for Exemption of Work of Art
✓	260-A	09	06/11	Prescribed	254	No	Yes	Certificate and Affidavit for Exemption of Certain Aircraft
✓	260-B	13	06/11	Prescribed	254	No	Yes	Claim for Exemption from Property Taxes of Aircraft of Historical Significance
✓	261	09	08/06	Prescribed	252	No	No	Claim for Veterans' Property Tax Exemption
	261-D	02	08/10	Prescribed	571(c) Act	Yes	Yes	Servicemembers Civil Relief Act Declaration
✓	261-G	23	05/15	Prescribed	205.6; 251	Yes	Yes	2013 Claim for Disabled Veterans' Property Tax Exemption
✓	261-GNT	23	05/15	Prescribed	205.6; 251	Yes	Yes	2013 Disabled Veterans' Exemption Change of Eligibility Report
✓	262-AH	08	05/15	Prescribed	254	No	Yes	Church Exemption Claim
✓	263	11	05/12	Prescribed	254	No	Yes	Lessors' Exemption Claim
✓	263-A	06	06/12	Prescribed	254	No	No	Qualified Lessors' Exemption
✓	263-B	02	08/10	Prescribed	254	No	Yes	Lessees' Exemption Claim
✓	263-C	02	06/11	Prescribed	254	No	Yes	Church Lessors' Exemption Claim
✓	264-AH	11	05/14	Prescribed	254	No	Yes	College Exemption Claim
✓	265	10	05/13	Prescribed	254	No	Yes	Cemetery Exemption Claim

	Number	Rev	Date	Classification	R&T Code §	Confidential	On Auxiliary Site	Title
✓	265-NT	10	05/15	Prescribed	254	No	Yes	Cemetery Exemption Change in Eligibility or Termination Notice
✓	266	12	05/14	Prescribed	251; 253.5	Yes	Yes	Claim for Homeowners' Property Tax Exemption (English and Spanish)
✓	266-E	01	06/11	Prescribed	480.1	No	Yes	Ownership Statement, Cooperative Housing Corporation
	266-Media	04	03/10	Recommended	218.5	Yes	Yes	Media Transmittal for Homeowners' Exemption Claim Records
✓	267	13	05/12	Prescribed	254	No	Yes	Claim for Welfare Exemption (First Filing)
✓	267-A	15	05/15	Prescribed	254	No	Yes	Claim for Welfare Exemption (Annual Filing)
	267-F	01	10/03	Recommended	254	No	Yes	Assessor's Finding on Qualification of Property Use, Welfare or Veterans' Organization Exemption
✓	267-FIR	02	03/08	Prescribed	254	No	Yes	Welfare Exemption Assessor's Field Inspection Report
✓	267-H	08	06/11	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Housing—Elderly or Handicapped Families
✓	267-H-A	01	06/11	Prescribed	254	No	Yes	Elderly or Handicapped Families, Family Household Income Reporting Worksheet
✓	267-L	13	01/12	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Housing—Lower-Income Households
✓	267-L1	10	06/11	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Low-Income Housing Property of Limited Partnership
	267-L-A	01	06/11	Prescribed	214(g)	No	Yes	Lower Income Households, Family Household Income Reporting Worksheet
✓	267-R	07	06/11	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Rehabilitation—Living Quarters
✓	267-S	11	05/12	Prescribed	254	No	Yes	Religious Exemption
✓	267-SNT	18	05/15	Prescribed	254	No	Yes	Religious Exemption Change in Eligibility or Termination Notice
✓	268-A	08	05/12	Prescribed	254	No	Yes	Public School Exemption
✓	268-B	10	05/14	Prescribed	254	No	Yes	Free Public Library or Free Museum Claim
✓	269-AH	10	06/11	Prescribed	254	No	Yes	Claim for Veterans' Organization Exemption
✓	269-FIR	02	03/08	Prescribed	254	No	Yes	Veterans' Organization Exemption Assessor's Field Inspection Report
✓	270-AH	05	08/10	Prescribed	254	No	Yes	Exhibition Exemption Claim from Property Taxes

	Number	Rev	Date	Classification	R&T Code §	Confidential	On Auxiliary Site	Title
√	277	05	02/11	Prescribed	254	No	BOE Only	Claim for Organizational Clearance Certificate—Welfare Exemption
√	277-F	01	02/07	Prescribed	254	No	BOE Only	Welfare or Veterans' Organization Exemption Organizational Clearance Certificate Finding Sheet
√	277-F1	01	02/07	Prescribed	254	No	BOE Only	Welfare or Veterans' Organization Exemption Organizational Clearance Certificate—Preliminary Notice
√	277-F2	02	02/07	Prescribed	254	No	BOE Only	Welfare or Veterans' Organization Exemption Organizational Clearance Certificate—Final Notice
√	277-L1	06	02/11	Prescribed	254	No	BOE Only	Supplemental Clearance Certificate for Limited Partnership, Low-Income Housing Property—Welfare Exemption
√	277-LLC	02	02/11	Prescribed	254	No	BOE Only	Claim for Organizational Clearance Certificate, Welfare Exemption—Limited Liability Company
√	277-OC	--	10/03	Prescribed	254	No	BOE Only	Organizational Clearance Certificate for Welfare or Veterans' Organization Exemption
√	277-SF	02	02/07	Prescribed	254	No	BOE Only	Supplemental Clearance Certificate Finding Sheet for Limited Partnership Low-Income Housing Property, Welfare Exemption
√	277-SF1	02	02/07	Prescribed	254	No	BOE Only	Supplemental Clearance Certificate—Preliminary Notice for Limited Partnership Low-Income Housing Property, Welfare Exemption
√	277-SF2	02	02/07	Prescribed	254	No	BOE Only	Supplemental Clearance Certificate—Final Notice for Limited Partnership Low-Income Housing Property, Welfare Exemption
√	278-H	01	03/09	Prescribed	254	No	BOE Only	Supplemental Reporting Form—Organizational Clearance Certificate Holders Nonprofit Hospital Organizations
√	278-OCC	02	02/11	Prescribed	254	No	BOE Only	Verification for Continued Eligibility of Organizational Clearance Certificate—Welfare or Veterans' Organization Exemption
√	278-SCC	01	08/08	Prescribed	254	No	BOE Only	Verification for Continued Eligibility of Supplemental Clearance Certificate—Welfare Exemption
√	279	04	02/11	Prescribed	254	No	BOE Only	Claim for Organizational Clearance Certificate—Veterans' Organization Exemption
√	305-A	02	08/09	Prescribed	1603(d)(1)	No	Yes	Informal Assessment Review
√	305-AH	07	06/08	Prescribed	1603(a)	No	Yes	Application for Changed Assessment
√	502-A	12	05/13	Prescribed	480.4(b)	Yes	Yes	Preliminary Change of Ownership Report
√	502-AH	15	05/13	Prescribed	480(c)	Yes	Yes	Change in Ownership Statement
√	502-D	08	05/14	Prescribed	480(c)	Yes	Yes	Change in Ownership Statement, Death of Real Property Owner
√	502-G	05	11/11	Prescribed	480(c)	Yes	Yes	Change in Ownership Statement: Oil and Gas Property
	502-P	02	05/11	Prescribed	480.6	No	Yes	Possessory Interests Annual Usage Report

	Number	Rev	Date	Classification	R&T Code §	Confidential	On Auxiliary Site	Title
	521-B	01	09/98	Prescribed	452(a)	Yes	No	Tree and Vine Record
✓	540-S	06	08/06	Prescribed	452(a); 441(a)	Yes	No	Mutual or Private Water Company Property Statement
✓	560-A	05	08/06	Prescribed	452(a); 441(a)	Yes	No	Aggregate Production Report
✓	560-B	06	08/06	Prescribed	452(a); 441(a)	Yes	No	Mining Production Report
✓	560-C	07	08/06	Prescribed	452(a); 441(a)	Yes	No	Mining Claim Production Report
✓	566-D	08	08/10	Prescribed	452(a); 441(a)	Yes	Yes	Oil and Dissolved Gas Production Report
✓	566-F	07	02/11	Prescribed	452(a); 441(a)	Yes	No	Dry Gas Production, Equipment, New Well, Redrill and Rework Report
✓	566-J	06	08/06	Prescribed	452(a); 441(a)	Yes	No	Oil, Gas and Geothermal Personal Property Statement
✓	566-K	08	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Annual Oil and Gas Operating Expense Data
✓	567-D	06	08/06	Prescribed	452(a); 441(a)	Yes	No	Geothermal Production Report
✓	567-K	07	08/07	Prescribed	452(a); 441(a)	Yes	Yes	Annual Geothermal Operating Expense Data
✓	570-1L	07	08/07	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Air Carrier's Operation Report (Flight Detail—Piston-Powered and Turboprop Types)
✓	570-1S	06	08/06	Prescribed	452(a); 441(a); Rule 202(e)	Yes	No	Air Carrier's Operation Report (Flight Detail—Jet Engine Types Only)
✓	570-2	03	08/04	Prescribed	452(a); 441(a); Rule 202(e)	Yes	No	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report (Flight Equipment Value Computation)
✓	570-3	03	08/04	Prescribed	452(a); 441(a); Rule 202(e)	Yes	No	Air Carrier's Operation Report (Aircraft Value Computations)
✓	570-3CF	01	08/07	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Air Carrier's Operation Report—Converted Freight
✓	570-FO1	02	01/08	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Supplementary Schedule to the Business Property Statement—Aircraft Cost Report
✓	570-FO2	02	01/08	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Supplementary Schedule to the Business Property Statement—Aircraft Value Computation
✓	571-A	18	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Agricultural Property Statement for 2013

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✓	571-C	17	05/15	Prescribed	452(a); 441(a)	Yes	Yes	2013 Power Plant Property Statement
✓	571-D	16	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Supplementary Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported Scheduled B of the Business Property Statement
✓	571-F	18	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Agricultural Property Statement for 2013
✓	571-F2	04	08/06	Prescribed	452(a); 441(a)	Yes	No	Registered and Show Horses Other Than Racehorses
✓	571-J	06	08/06	Prescribed	452(a); 441(a)	Yes	No	Annual Racehorse Tax Return
✓	571-J1	04	08/03	Prescribed	452(a); 441(a)	Yes	No	Annual Report of Boarded Racehorses
✓	571-K	07	08/06	Prescribed	452(a); 441(a)	Yes	No	Horse Property Statement (Other than Racehorses)
✓	571-L	20	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Business Property Statement for 2013 (Long Form)
✓	571-LA	18	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Alternate Schedule A for Bank, Insurance Company, or Financial Corporation Fixtures
✓	571-M	06	08/06	Prescribed	452(a); 441(a)	Yes	No	Miscellaneous Property Statement
✓	571-P	08	08/06	Prescribed	452(a); 441(a)	Yes	No	Pipeline Property Statement
✓	571-R	17	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Apartment House Property Statement for 2013
✓	571-RW	05	08/06	Prescribed	452(a); 441(a)	Yes	No	Right-of-Way Property Statement
✓	571-S	18	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Business Property Statement for 2013 (Short Form)
✓	572-A	02	09/10	Prescribed	480.7	Yes	No	Insurance Company Statement of Transfer
✓	576-D	16	05/13	Prescribed	452(a); 441(a)	Yes	Yes	Vessel Property Statement
✓	576-E	07	05/15	Prescribed	254	No	Yes	Affidavit for 4 Percent Assessment of Certain Vessels
✓	577	04	05/15	Prescribed	452(a); 441(a); 5365	Yes	Yes	Aircraft Property Statement
	577-A	02	08/09	Prescribed	5368	No	Yes	Airport Operations Report
	740-A	06	01/10	Recommended	670	No	Yes	Application for Temporary Appraiser Certificate
	743-A	06	07/08	Recommended	670	No	Yes	Report of Property Appraisers' Change in Employment Status
	744-A	09	07/08	Recommended	670	No	Yes	Request for Training Hours

	<b>Number</b>	<b>Rev</b>	<b>Date</b>	<b>Classification</b>	<b>R&amp;T Code §</b>	<b>Confidential</b>	<b>On Auxiliary Site</b>	<b>Title</b>
	745-A	05	10/09	Recommended	670	No	Yes	Request for Course Approval
	746-A	06	07/08	Recommended	670	No	Yes	Course Registration
	747-BC	07	10/11	Recommended	670	No	Yes	Application for Advanced Appraiser Certification
	747-CC	01	07/08	Recommended	670	No	Yes	Application for Advanced Appraiser Certification: Supplemental Schedule for Non-BOE Courses
	901-V	01	08/09	Prescribed	994	No	Yes	Application for Deduction of Vehicles' License Fees from Property Tax