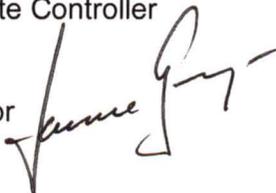


# Memorandum

To : Honorable Jerome E. Horton, Chairman  
Honorable Michelle Steel, Vice Chair  
Honorable Betty T. Yee, First District  
Senator George Runner, Second District  
Honorable John Chiang, State Controller

Date : March 1, 2012

From : Jaime Garza, Deputy Director  
External Affairs Department



Subject : **eReg Project: Status Update and Demonstration**  
**March 20-21, 2012 – Customer Service and Administrative Efficiency Committee**

Please place the following item on the Board's March 20-21, 2012 calendar under the Customer Service and Administrative Efficiency Committee.

Customer Service and Administrative Efficiency Committee

1. eReg Project Update – eReg will replace the manual paper application process for registering a tax or fee payer. Presentation of a brief demonstration showing new Internet-based registration system from an applicant's perspective.

JG:rs

Attachments

cc: Mrs. Regina Evans  
Mr. Joel Angeles  
Mr. Alan LoFaso  
Mr. Sean Wallentine  
Ms. Diane Olson (MIC: 80)  
Ms. Kari Hammond (MIC:19)

Approved:



Kristine Cazadd  
Executive Director



**BOARD OF EQUALIZATION**  
**CUSTOMER SERVICE AND ADMINISTRATIVE**  
**EFFICIENCY COMMITTEE MEETING AGENDA**

Ms. Michelle Steel, COMMITTEE CHAIR  
450 N STREET, SACRAMENTO - ROOM 121  
March 20 – 21, 2012 – **10:00 A.M.**

**Agenda Item**

***eReg Project: Status Update and Demonstration***

Customer Service and Administrative Efficiency Committee

1. eReg Project Update – eReg will replace the manual paper application process for registering a tax or fee payer. Presentation of a brief demonstration showing new Internet-based registration system from an applicant's perspective.



||| [FAQ](#) | [MAIN MENU](#) |||

## Registration - Main Menu

For assistance during regular business hours call 800-400

Welcome to the Board of Equalization's (BOE) on-line registration system. The BOE administers various tax and fee programs that fund state, county, city and special jurisdictions. The type of permit, license and / or account required is dependent upon the type of business activity or personal use transaction. The BOE's on-line registration system will guide you through the process whether or not you know what type of registration you require. Answers to specific questions regarding your business activity or personal use transaction will direct you to the appropriate registration type(s) required.

Select the option you prefer:

- [Register a business activity with BOE](#) ⓘ  
(Seller's Permit, Qualified Purchaser, Underground Storage Tank Fee and all other accounts)
  - [Add new location to an existing account](#) ⓘ
- [Register for a IFTA Account](#) ⓘ
- [Register for a Timber Yield Tax Account](#) ⓘ
- [Apply for and purchase a California Fuel Trip permit](#) ⓘ
- [Apply and purchase Annual Flat Rate Decals for private passenger vehicles](#) ⓘ
- [Pay use tax, file an exemption or request a tax clearance](#) ⓘ  
(Vessel, Vehicle, Aircraft, or Manufactured Home/Mobile Home)
- [Pay use tax on one-time purchase item\(s\)](#) ⓘ

**eClient Login**

User ID

Password

[Forgot Password](#)

**Registration - Business Activities**

For assistance during regular business hours call 800-400

The following selections will assist us in determining which registration types you need.

My business activity includes (select all that apply):

1.  Selling items or goods in California
2.  Purchasing items for use in California, without paying tax
3.  Claiming bad debt losses (Lender)
4.  Operating a vehicle interstate or Operating as a common carrier
5.  Exempt bus operator
6.  Train operator
7.  Using Fuel Products in an exempt manner
8.  Underground Storage Tank(s) used to store petroleum products
9.  Using alternative fuels (liquid propane gas, LPG; liquid natural gas, LNG; compressed natural gas, CNG)
10.  Employing 10 or more people
11.  Generating 5 tons or more of Hazardous waste within a calendar year at any site
12.  Electrical Energy Services
13.  Natural Gas
14.  Telephone or Voice Over Internet Protocol (VOIP) services

[Previous](#)[Next](#)



III [FAQ](#) | [MAIN MENU](#) III

## Registration - Business Activities

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My business activity includes (select all that apply):

### Selling items or goods in California

- Alcoholic beverages
- Cigarette and / or tobacco products
- Selling new tires, new or used motor vehicles, construction equipment or farm equipment
- Selling covered electronic devices (e.g., television, portable DVD player, or computer screens greater than 4 inches diagonally)
- Fuel Products (i.e. Selling, storing, importing, manufacturing or distributing fuel products in California or operating an oil refinery, terminal, or pipeline in marine terminal waters)

[Previous](#)

[Next](#)



||| [FAQ](#) | [MAIN MENU](#) |||



### Registration - Business Activities

For assistance during regular business hours call 800-400

My business activity includes (select all that apply):

#### Cigarette and / or tobacco products

- 1.  Selling cigarettes at retail
- 2.  Selling cigarettes at wholesale
- 3.  Importing cigarettes from outside of the United States
- 4.  Manufacturing cigarettes
- 5.  Distributing cigarettes to wholesalers and / or retailers
- 6.  Stamping Cigarettes
- 7.  Selling tobacco products at wholesale (other than cigarettes)
- 8.  Importing and / or manufacturing tobacco products (other than cigarettes)
- 9.  Distributing of tobacco products (other than cigarettes)

Previous

Next



III [FAQ](#) | [MAIN MENU](#) III

Empty rectangular box

### Registration

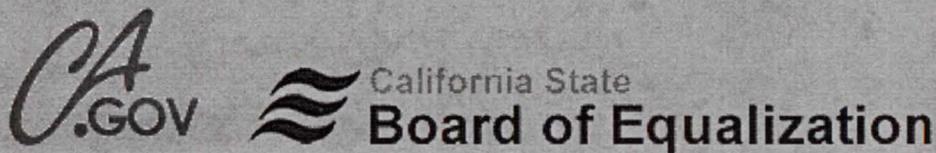
For assistance during regular business hours call 800-400

Based on the responses provided it appears that you need to register for the following accounts with the BOE:

Tax Program	Registration Type	Register
Sales and Use Taxes	Seller's Permit	<input checked="" type="checkbox"/>
Cigarette Tax/Tobacco Products Tax	Cigarette and Tobacco Products Retailer License	<input checked="" type="checkbox"/>

- Cigarette and Tobacco Products Retailer License requires \$100 one-time license fee for each selling location.

[Previous](#) [Next](#)



III [FAQ](#) | [MAIN MENU](#) III

## Declaration of Intent

For assistance during regular business hours call 800-400

# Declaration of Intent

It is my intent to register for a California tax or fee permit, license and/or account with the State Board of Equalization.

I declare that all the information I provide for this electronic application has been examined by me and to the best of my knowledge and belief is a true, correct and complete application. I understand that I will be creating a tax, fee or license account that may result in the responsibility to file returns and/or result in the responsibility to pay a tax or fee to the Board of Equalization. I certify that I am duly authorized to submit this application and that all parties responsible for paying the tax or fees associated with the accounts that will be created by this application are aware that I am submitting the application on their behalf.

If the tax, fee or license account I am creating requires a payment or includes a balance due return and I choose to pay by Automated Clearing House (ACH) debit, I consent that my payment due be automatically withdrawn from my bank account to the BOE's bank account in the amount specified on each registration or return submitted. Regardless of the method of payment chosen, I understand that if the BOE does not receive full payment of my tax, fee or permit liability, I remain liable for all applicable tax, interest and penalties. I understand that no tax or fee permit, license and/or account will be created until I submit the application to the Board of Equalization at the end of the E-Registration Process.

By clicking on the "Accept" button below, I am declaring my understanding of the above and my intent to eRegister.

It is suggested that you print a copy of this declaration for your records.

### Registration - Ownership Information

Registration Id: 99000220

tommy tester (edit)

For assistance during regular business hours call 800-400

Last Updated By on 12/13/2011 at 03:42::

**Preparer** | Ownership Information | Sales Activities | Business Information | Review

#### Individual

Name: tommy tester

aka:

\*Identification Type:   ⓘ

\*Identification Number:

\*SSN:

\*Date of Birth:

FEIN:

SEIN:

#### Contact Information

\*Telephone Number:

Mobile Number:

Email Address: tommy.test@boe.ca.gov

\*Books and records maintained by owner?  Yes  No

\*Is the owner the contact for business activities?  Yes  No

#### Home Address

**\*Business or Trade Name (DBA)**

Tommy's Smoke Shop

**Business Activities**

- Seller's Permit \*Start Date (mm/dd/yyyy): 01/02/2012 
  - Cigarette and Tobacco Products Retailer License
- Please note the BOE will determine the start date for all accounts.*

**Business Address**

\*Street: 450 N ST  
 \*City: SACRAMENTO \*State: California  
 \*Zip: 95814 - 4311  
 \*Country: UNITED STATES OF AMERICA

\*Is the address located within city limits?  Yes  No

\*Telephone Number: 916-555-1212

\*Email Address: tommy.test@boe.ca.gov

Use as mailing address

**Business Purchase/Transfer Information**

\*Are You Buying or Transferring an Existing Business?  Yes  No 

### Business Purchase/Transfer Information

\*Are You Buying or Transferring an Existing Business?  Yes  No

### Business Type

\*NAICS Code:  - Other Direct Selling Establishments

*If you do not know your NAICS code, click [here](#)*

\*Are you making Internet Sales?  Yes  No

\*Website Address:

### Other BOE Accounts

Please enter other BOE Accounts you have :

<input type="text"/>				
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### Credit Card Processor

\*Will the business be accepting credit card payments?  Yes  No

Merchant Card Processor Name:

Merchant Card Processor Account:

**Registration - Activity Information**

For assistance during regular business hours call 800-400

Registration Id: 99000220

tommy tester ([edit](#))

Last Updated By tommy tester on 12/13/2011 at 03:50:

- [Preparer](#)
- [Ownership Information](#)
- [Sales Activities](#)
- [Business Information](#)
- [Activity Information](#)
- [Review](#)

**Seller's Permit**

\*Start Date (mm/dd/yyyy):

\*Projected Monthly Sales:  .00

\*Projected Monthly Taxable Sales:  .00

\*Products that will be sold during the course of business:

**\*Add Suppliers +**

#	Name	Address	Telephone Number	BOE Account Number	Products Purchased		
1	Costco	1230 Main Street, Sacramento CA 95815	916-555-1214		Cigarettes	<a href="#">Edit</a>	<a href="#">Delete</a>

- [Previous](#)
- [Save](#)
- [Clear](#)
- [Delete Application](#)
- [Next](#)

Notes  
\* = Required field

## Registration - Review

Registration Id: 99000220

tommy tester ([edit](#))

For assistance during regular business hours call 800-400

Last Updated By tommy tester on 12/13/2011 at 03:50:00

- [Preparer](#)
- [Ownership Information](#)
- [Sales Activities](#)
- [Business Information](#)
- [Activity Information](#)
- [Review](#)
- [Payment](#)

### Required Registrations

- Seller's Permit
- Cigarette and Tobacco Products Retailer License

### Preparer Information ([edit](#))

\*Business entity type you are registering for: **Individual**

\*What is your role in this application: **Owner**

\*Are you going to register for multiple business locations? **No**

### Ownership Information ([edit](#))

#### Individual

Name: **tommy tester**

aka:

\*Identification Type: **Driver License Number, California**

\*Identification Number: **D9876543**

\*SSN: **555-55-5555**

\*Date of Birth: **2/28/1985**

FEIN:

SEIN:



||| [FAQ](#) | [MAIN MENU](#) | [BOE ELECTRONIC SERVICES](#) | [LOG OUT](#) |||

### Registration - Payment Information

For assistance during regular business hours call 800-400

Registration Id: 99000220

tommy tester (edit)

Last Updated By tommy tester on 12/13/2011 at 03:53:01

- [Preparer](#)
- [Ownership Information](#)
- [Sales Activities](#)
- [Business Information](#)
- [Activity Information](#)
- [Review](#)
- [Payment](#)

Total Amount Due: \$100.00

Payment Amount: \$100.00 ⓘ

Payment in full is required to process application.

\*Payment Method:  ⓘ

\*Enter 9-digit Routing Transit Number: (No blank spaces)  ⓘ

\*Enter Bank Account Number: (Do not include check number for checking accounts)   Checking  Savings ⓘ

\*Re-enter Bank Account Number: (Do not include check number for checking accounts)

Verify your information by re-entering the Bank Account Number. If your account was issued checks, refer to your actual check. Do NOT use a deposit slip to obtain the information requested. You may contact your bank regarding the proper Bank Routing Transit Number to use for this type of transaction. Failure to enter the correct banking information may cause your payment to reject and may subject your account to delinquency charges.

Payment Effective Date: 12/13/2011

Notes  
\* = Required field



||| [FAQ](#) | [MAIN MENU](#) | [BOE ELECTRONIC SERVICES](#) | [LOG OUT](#) |||

### Registration - Payment Review

Registration Id: 99000220

tommy tester ([edit](#))

For assistance during regular business hours call 800-400

Last Updated By tommy tester on 12/13/2011 at 03:53:01

- [Preparer](#)
- [Ownership Information](#)
- [Sales Activities](#)
- [Business Information](#)
- [Activity Information](#)
- [Review](#)
- [Payment](#)

Please review the information below. If the information is incorrect click on the previous button below and make the necessary corrections.

Total Amount Due: **\$100.00**

Payment Amount: **\$100.00**

Payment Method: ACH Debit

With: BANK OF AMERICA, N.A.

Bank Routing Number: 121000044

Account Number: \*\*\*\*\*3456

Bank Account Type: Checking

[Previous](#) [Submit](#)



||| [FAQ](#) | [MAIN MENU](#) | [BOE ELECTRONIC SERVICES](#) | [LOG OUT](#) |||

### Registration Status

Registration Id: 99000220

[Redacted]

tommy tester ([edit](#))

For assistance during regular business hours call 800-400

Last Updated By tommy tester on 12/13/2011 at 03:55:

Owner Name: tommy tester

Application Status: Submitted

[Application Detail](#)      [General Publications](#)

Express Login Code: t125032p

*\*Please Note: Once you have submitted your application, account information can only be updated by contacting the board.*

#### Seller's Permit

Registration Status: Issued

Your registration with the BOE is complete, please review the following information:

Reporting Basis: Quarterly Reporting

*Security deposit is not required at this time. However, a security deposit may still be required in the future.*

I acknowledge that I have read and understand the above account information.

#### Cigarette and Tobacco Products Retailer License

Registration Status: Pending

Owner Name: tommy tester

Application Status: Submitted

[Application Detail](#)      [General Publications](#)

Express Login Code: t125032p

*\*Please Note: Once you have submitted your application, account information can only be updated by contacting the board.*

### Seller's Permit

Registration Status: Issued

Your registration with the BOE is complete

Reporting Basis: Quarterly Report

Security deposit is not required at this time

Account Number: 900002672

Click here to review and print your [Registration Packet](#)

**Seller's Permit Packet**

- [Seller's Permit](#)
- [Filing Instructions for Sales and Use Tax Accounts](#)
- [California City and County Sales and Use Tax Rates](#)
- [Your California Seller's Permit](#)
- [E-file Guide](#)
- [California Employer's Guide 20XX](#)
- [Applicable Regulations](#)
- [Applicable Publications](#)

### Cigarette and Tobacco Products Retailer License

Registration Status: Pending

Thank you for submitting your application. Your application is currently being processed.

You will be notified via email when the status of your application changes.

450 N ST, SACRAMENTO CA 95814-4311

Registration Status: Pending

### Payment Information

DISPLAY CONSPICUOUSLY AT PLACE OF BUSINESS FOR WHICH ISSUED

CALIFORNIA STATE BOARD OF EQUALIZATION

SELLER'S PERMIT



ACCOUNT NUMBER

01/02/2012 SR KH 900-002672

TOMMY'S SMOKE SHOP  
TOMMY TESTER  
450 N ST  
SACRAMENTO, CA 95814-4311

NOTICE TO PERMITTEE:  
You are required to obey all Federal and State laws that regulate or control your business. This permit does not allow you to do otherwise.

IS HEREBY AUTHORIZED PURSUANT TO SALES AND USE TAX LAW TO ENGAGE IN THE BUSINESS OF SELLING TANGIBLE PERSONAL PROPERTY AT THE ABOVE LOCATION. THIS PERMIT IS VALID ONLY AT THE ABOVE ADDRESS.

THIS PERMIT IS VALID UNTIL REVOKED OR CANCELED AND IS NOT TRANSFERABLE. IF YOU SELL YOUR BUSINESS OR DROP OUT OF A PARTNERSHIP, NOTIFY US OR YOU COULD BE RESPONSIBLE FOR SALES AND USE TAXES OWED BY THE NEW OPERATOR OF THE BUSINESS.

Not valid at any other address

For general tax questions, please call our Information Center at 800-400-7115.  
For information on your rights, contact the Taxpayers' Rights Advocate Office at 888-324-2798 or 916-324-2798.