

FINANCIAL MANAGEMENT COMMITTEE

*HIS WORSHIP, THE MAYOR
AND COUNCILLORS*

SUBJECT: MY PROPERTY PORTAL

RECOMMENDATION:

1. THAT Council receive this report for information purposes.

REPORT

The Financial Management Committee, at its meeting held on 2019 January 22, received and adopted the *attached* report providing an overview of the new “My Property” portal available to citizens on 2019 February 01.

Respectfully submitted,

Mayor M. Hurley
Chair

Councillor S. Dhaliwal
Vice Chair

Copied to:	City Manager Director Finance Chief Information Officer
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TO: CHAIR AND MEMBERS
FINANCIAL MANAGEMENT COMMITTEE

DATE: 2019 January 16

FROM: DIRECTOR FINANCE
CHIEF INFORMATION OFFICER

FILE: 7810-01

SUBJECT: MY PROPERTY PORTAL

PURPOSE: This report is provided as an overview of the new My Property portal being available to citizens on 2019 February 01.

RECOMMENDATION:

1. **THAT** the Financial Management Committee recommend Council receive this report for information purposes.

REPORT**1.0 BACKGROUND**

The City has now gone live with the new Tempest Property Tax System. The initial deployment includes 12 of the system's 20 modules, with the remaining modules scheduled to be made fully available to users between now and the end of the year, as required to meet scheduled Tax Office functions. One such module is the new *My Property* portal, which is to be made available to the public on 2019 February 01.

A standard option available with the Tempest product, the *My City* portal (branded for Burnaby as the *My Property* portal) provides customers with out of the box, user friendly functionality that requires minimal configuration by the City. The City is deploying the latest version of the portal software, with branding and colour schemes edited to align with other existing external facing applications. The portal offers the following key services to customers:

- Access to account information, anytime, anywhere
- The ability to view utility and property tax balances including recent payments
- Access to property legal description, assessment history, and property tax levy data
- Provides users with the ability to sign up for e-billing services, to receive bills via email
- Allows users to download and print bills
- Allows users to claim their Home Owner Grant
- Once the module is live, will show commercial customers details consumption information for Metered Water and Sewer Accounts

2.0 POLICY SECTION

Goal

- A Connected Community
 - Digital Connection –
Provide online access to core City services and information

- A Thriving Organization
 - Financial Viability –
Maintain a financially sustainable City for the provision, renewal and enhancement of City services, facilities and assets

 - Human Resources –
Foster an environment for teamwork, efficiency and excellence to deliver customer service in alignment with our core values

 - Communication –
Practice open and transparent communication among staff, Council and the community

 - Reliable Services, Technology and Information –
Protect the integrity and security of City information, services and assets

 - Technology and Innovation –
Support technology development and innovation to empower staff and to advance community objectives

3.0 MY PROPERTY PORTAL

The following is an overview of the new portal and key customer related changes:

Profile Registration – First-time users are required to create a profile before they can access their account information. The profile creation step simply requires the user to enter a valid email address and create a password. The system will then send the user an email to confirm validity of the email address, through which their profile is then activated.

Figure 1: Portal Registration

The screenshot shows the 'My Property Portal' login and registration interface. At the top left is the City of Burnaby logo. The header area is green with the text 'Welcome to My Property Portal'. Below the header, there are links for 'Home' and 'Login' on the left, and a 'Logout' link on the right. The main heading is 'My Property Portal' with a sub-heading 'Welcome to the City of Burnaby's property tax and utility account portal'. Underneath is a 'Login' section with two input fields: 'Email Address' (containing '@burnaby.ca') and 'Password' (masked with dots). A green 'Login' button is positioned below the password field. Below the login fields, there is a link for 'Forgot your password?' and a link for 'Read the Terms of Use'. At the bottom of the login section, there is a message: 'Don't have an account? Register first.' followed by the instruction 'Please create an online account with a valid email address' and a green 'Register Now' button.

Linking Accounts and Account Numbers – Once a profile has been activated, the next step is for customers to link a Utility or Tax Account. In February, customers will receive their Annual Utility Notice, the first bill to be generated from the new system. Under the new system the City is moving away from a combined Tax and Utility Account, to a two account concept. As such Utility Accounts are to be treated separately to Taxes. While the Roll Number will remain as the account number for taxes, but now referred to as the Folio Number, a new seven (7) digit account number will be used for utilities. When linking a Utility Account, the new 7 digit Account Number and Access Code is required. This information appears at the top of each notice.

Figure 2: Account Registration

The screenshot shows the 'Register a Utility Account' page. At the top left is the City of Burnaby logo. At the top right is the text 'Welcome to My Property Portal'. Below the header, there is a breadcrumb trail: 'Home > Register a Utility Account' and a 'Logout' link. The main heading is 'Register a Utility Account'. Below this, there is a link: 'Where do I find my [Utility Account Number and Access Code?](#)'. The form contains three input fields: 'Account Number', 'Access Code', and 'Subscribe for eBilling?' with 'Yes' and 'No' radio buttons. There is also a checkbox for 'I'm not a robot' and a reCAPTCHA logo. A green 'Register' button is at the bottom.

This concept is the same when linking a tax account, however the system will suggest accounts to link based on the contact / owner and address information being the same. Below the system is suggesting a tax account to link.

Figure 3: Linking Accounts

The screenshot shows the 'Register Account - Confirmation' page. At the top left is the City of Burnaby logo. At the top right is the text 'Welcome to My Property Portal'. Below the header, there is a breadcrumb trail: 'Home > Register Account - Confirmation' and a 'Logout' link. The main heading is 'Register Account - Confirmation'. Below this, there is a message: 'Your account has been registered'. Below the message, there is a link: 'To register another account click the "Register Another Account" button'. There are two green buttons: 'Register Another Account' and 'Home'. Below the buttons, there is a section titled 'Related Accounts'. It shows a card for 'BROADWAY' with a 'Folio' field and a dropdown arrow.

Ability to Link Multiple Accounts – For people with multiple properties, or responsibility for managing the accounts for others, the system offers the ability to link more than one account. To do this, customers require the Account Number / Folio Number and Access Codes for each account.

Figure 4: Account Listing



Account Information – Once an account has been linked, customers can access a variety of information, including transactional details, civic legal address and owner data, account balances, assessments, and levy details. Planned for future deployment is the ability for customers to sign up to the Pre Authorised Withdrawal Plan via the portal, and the ability to make payments via credit card for Utility Accounts.

Figure 5: Example, Utility Data

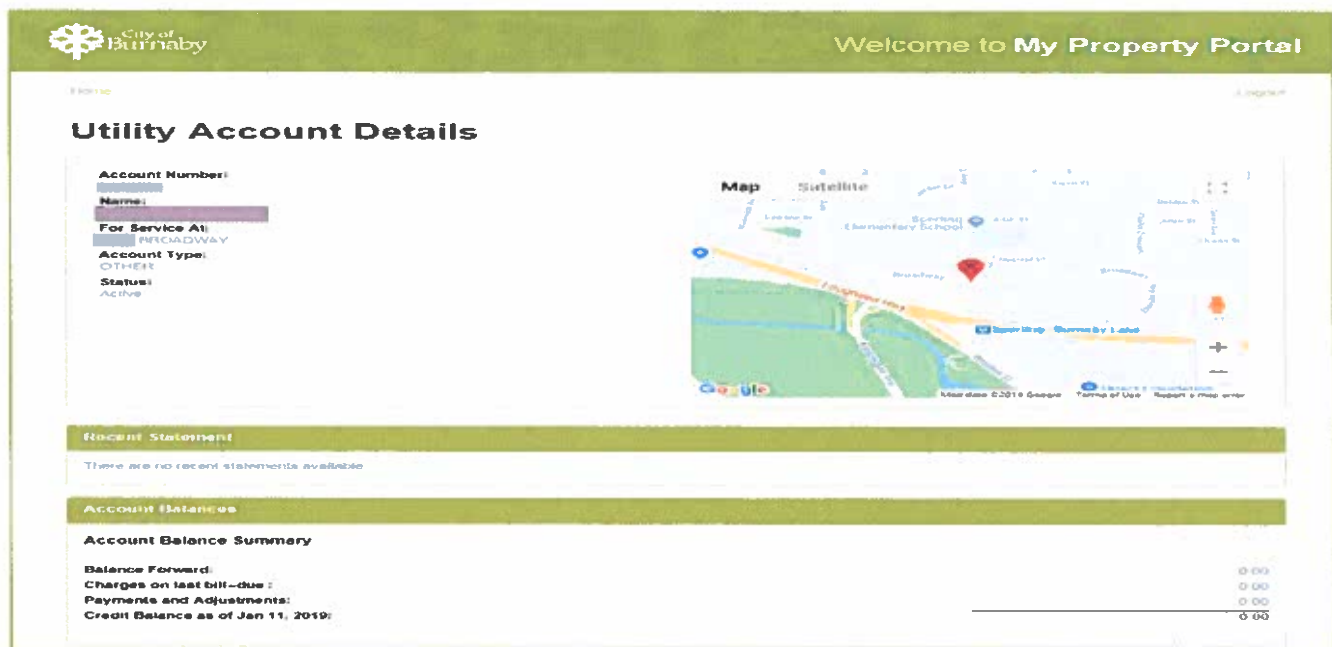


Figure 6: Example, Tax Data

Levy Details					
2018 Levies					
Year	Class	Levy Amount			
2018	1 - Res	2,300.00			
Total REGULAR Levy (Due Jul 04, 2018):		2,300.00			
Levy	Class	Taxable Amt	Rate	Levy Amt	
BCA	1 - Res	810,000.00	0.04030	32.64	
GENERAL	1 - Res	810,000.00	1.50630	1,220.10	
MFA	1 - Res	810,000.00	0.00020	0.16	
REGIONAL DISTRICT	1 - Res	810,000.00	0.04170	33.78	
SCHOOL	1 - Res	810,000.00	1.03950	842.00	
TRANSIT	1 - Res	810,000.00	0.21150	171.32	
Assessment Details					
2018 General Assessment					
Assessment Class	Land	Improvements	Total		
Residential (GROSS)	671,000	139,000	810,000		
Residential (EXEMPT)	0	0	0		
Residential (NET)	671,000	139,000	810,000		


Access to eBills – The current service provided through Canada Post for the delivery of electronic bills from the City of Burnaby has now ended. All subscribers to the e-post service are due to receive a notification in late January informing them of the new *My Property* portal. Historic bills are available via e-post until customers unsubscribe their accounts, and will be retained by the City on an ongoing basis. From the time of first billing in Tempest, users will have access to 2019 and all future bills for as long as they have a relationship to the property for which the account is registered. ebills appear as a PDF link on their account, as demonstrated below.

Figure 7: eBill Link

2018 Transactions

Date	Type	Amount	Balance	Note
May 01, 2018	TRANSFER INSTALMENTS	-814.93	-814.93	
May 16, 2018	LEVY	2,300.00	1,485.07	
	TOTAL	1,485.07		
	TOTAL OWING	1,485.07		

eBills

 Notice dated May 16, 2018

Statement Notification Method

Select how you would like to receive account statements:

Paper Only (CURRENT) ✓ Email Only

Each time a new bill is generated by the City, customers who have signed up to the email delivery process will also receive a PDF copy of their bill via email once billing has been completed.

Home Owner Grants – The *My Property* portal also serves as the means by which customers will claim their Home Owner Grant online. The existing City web interface for this service has now been discontinued. The new system allows the City to capture information in the required format for the Province, without the need for the customer to go to a separate website. Once complete, the customer’s account is updated in real time, with staff also able to see transactions as soon as they occur. This real time entry and update greatly reduces customer uncertainty around claiming online; and it is hoped will reduce the volume of enquires on Home Owner Grant payment confirmations made to the City.

Figure 8: Home Owner Grant Screen

City of Burnaby

Welcome to My Property Portal

Home > Home Owner Grant Logout

Home Owner Grant

Property Information

Folio Number: [REDACTED]
Civic Address: CUMBERLAND ST BURNABY BC V3N 4Y6

Grant Amount Available

Basic	\$570.00
Additional	\$845.00

Information

Only one Home Owner Grant can be claimed by you or your spouse each year

You may be required to submit additional documentation to establish your eligibility and Home Owner Grants are audited for up to seven years to ensure applicants are eligible for the grants they receive

Shared information

The information provided on this form may be shared for the purposes of administering the *Land Tax Deferment Act*, *Property Transfer Tax Act* and *Taxation (Rural Area) Act*

1. I,

First Name* [REDACTED]
Last Name* [REDACTED]
Initial [REDACTED]

Certify that:

(a) I am the registered owner of the residence.

I am a Canadian citizen or permanent resident, I ordinarily reside in British Columbia and I occupy as my principal residence the whole or part of the building(s) located on this Property;

Neither I nor my spouse nor the deceased owner have applied for or received a home owner grant on this Property or any other property in the Province during this calendar year and, to the best of my knowledge, no other person has received a home owner grant on this Property during this calendar year.

(b) I am the spouse or relative of the deceased owner and at the date the owner passed away we both occupied this residence as our principal residence.

I am a Canadian citizen or permanent resident, I ordinarily reside in British Columbia and I occupy as my principal residence the whole or part of the building(s) located on this Property;

Neither I nor my spouse nor the deceased owner have applied for or received a home owner grant on this Property or any other property in the Province during this calendar year and, to the best of my knowledge, no other person has received a home owner grant on this Property during this calendar year.

2. I also qualify for the additional grant amount as:

I am a senior aged 65 or older this year, date of birth being

Day* [REDACTED]
Month* [REDACTED]
Year* [REDACTED]

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From: Director Finance and Chief Information Officer
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Guidance – Information regarding the *My Property* portal will be included in the 2019 Utility Brochure, available on the City’s external website and through various other means, including video and social media. Procedures are in place to manage the transition to the new platform, with the majority of enquiries anticipated around the time customers will be completing their Home Owner Grant Application. It is hoped that through driving traffic to the *My Property* portal in February for Utility billing and payment, customers will feel comfortable with the system by the time they receive their Tax Notices in early June.

Figure 9: 2019 Utility Charges Brochure



The brochure features a background image of a cityscape with a lake and mountains. It includes several callouts: a yellow circle with a car icon, a yellow circle with a trash can icon, a yellow circle with a water tap icon, and a yellow circle with a camera icon. A central orange circle contains contact information for the Tax Office. A dark green circle in the bottom right corner says 'NEW! Sign up for your online account.' The bottom of the brochure has a yellow background with the City of Burnaby logo, tax office address, and payment due date.

**NEW! SIGN UP TODAY
UTILITY AND PROPERTY TAX
ONLINE SERVICES**

You can now access the following services all in one place. Visit burnaby.ca/myproperty and create your "My Property" account to:

- » access your account information, anytime, anywhere
- » view utility and property tax balances including recent payments
- » access your property's legal description, assessment history and tax levies
- » sign up for e-billing to receive notices and bills via email
- » download and print your bills
- » claim your Home Owner Grant (coming May 2019)
- » view water meter consumption for commercial properties (coming soon)

**CHANGES TO
ONLINE PAYMENT PROCESS
DON'T STAND IN LINE PAY ONLINE**

New Payee Set-up is Required for Utilities
The online payment process through your financial institution has changed slightly this year. The City now has two payees, one for Utilities and one for Property Taxes. You will be required to set up a new payee to pay your Utility Notice. You can no longer use last year's payee for Utilities.

In the bill payment section of your online banking, add the City of Burnaby (Utilities) as the new payee and use the 7 digit Account Number on your Utility Notice.

For further information, contact the Tax Office:
phone: 604-294-7350
email: tax@burnaby.ca

Or go to burnaby.ca/propertytaxes

NEW!
Sign up for your online account.

**2019
CITY OF BURNABY
UTILITY CHARGES**

**PAYMENT DUE DATE:
FRIDAY, MARCH 15, 2019**

TAX OFFICE
4547 Calixa Way
Burnaby BC, V5C 1M2

Alternative provisions have been made to assist those customers who wish to claim their Home Owner Grant online but may have difficulty setting up a profile.

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Increasing Online Uptake - Currently the City receives over 31,200 Home Owner Grant applications online, out of 46,500. At around 67%, it is hoped that that this percentage can be increased. At the same time, only a relatively small number of customers receive their bills electronically through e-post, around 3,000 out of 80,000 accounts. By driving traffic to *My Property*, it is anticipated that this number will increase, which in turn will reduce printing and postage costs, provide customers with more timely information, and avoid dependancies on other service delivery methods.

4.0 SUMMARY

Roll out of the *My Property* portal is a significant step forward in providing improved customer service. The current customer uncertainties about items such as payments, grant claims and missing bills, that result in customer queries by email or phone should reduce significantly with time. It is however anticipated that there will be an initial learning curve for both customers and staff as we become accustomed to the new system. With additional items such as Metered Water billing information due to come online through the portal in the next two months, staff also believe the new application will provide the opportunity to better assist customers with items such as leak detection and billing enquiries.

5.0 RECOMMENDATION

It is recommended that the Financial Management Committee recommend Council receive this report for information purposes.



Shari Wallace
CHIEF INFORMATION OFFICER



Noreen Kassam, CPA, CGA
DIRECTOR FINANCE

NK:RR:SW /ml

Copied to: City Manager