



# EGUSD MELLO-ROOS TAX FAQs

## ELK GROVE UNIFIED SCHOOL DISTRICT – FACILITIES AND PLANNING

### I am currently enrolled in the tax reduction program. Why is the EGUSD Mello-Roos Tax and EGUSD GOB still on my property tax bill?

**i** You will still see the **EGUSD Mello-Roos Tax** (direct levy #0155) assessed on your property tax bill. This is a **70% tax reduction** and **not an elimination** of taxes, therefore the amount on the property tax bill should reflect the **reduced rate** from the original rate. You can contact our office to verify the amounts.

**Elk Grove USD GOB** (under ad valorem taxes) is not subject to the EGUSD Mello-Roos tax reduction. EGUSD GOB is Measure M, which was voter approved and passed in 2016. See [measurem.egusd.net](http://measurem.egusd.net)

### What is the EGUSD Mello-Roos Tax?

**i** The Elk Grove Unified School District Mello-Roos tax was created in 1987 by a two-thirds vote by citizens and amended in 1997. The district special tax is for the Elk Grove Unified School District's bond needed to build and modernize school classrooms and related facilities.

### Why do I have to pay the EGUSD Mello-Roos Tax? Can I get it removed?

**i** All residents living within the Elk Grove Unified School District boundary are subject to paying the EGUSD Mello-Roos Tax (levy #0155). This tax cannot be removed from your property tax bill however, those who qualify can get a 70% reduction for the EGUSD Mello-Roos tax (levy #0155).

### What is the EGUSD Mello-Roos Tax Reduction? What are the qualifications?

**i** The EGUSD Mello-Roos tax reduction is a special tax reduction that will help reduce **direct levy #0155** by 70%. (i.e. \$45.84/year will be reduced to \$13.75/year.)

**Please know that this a reduction for a specific direct levy (#0155) on your property tax bill. This is NOT an exemption from Mello-Roos tax nor is it a reduction to your entire property tax bill.**

To qualify, you must meet **one** of the following:

- 65 years or older and have no school-age children (TK-12) living in the residence OR
- Permanently disabled and have no school-age children (TK-12) living in the residence

### Will I automatically receive the EGUSD Mello-Roos tax reduction based on meeting the qualifications above?

**i** Unfortunately, no. We have no way of knowing everyone living within the Elk Grove School District's boundary qualifications per household; we do not have access to such data. Therefore, you must notify us if you qualify and would like to receive the reduction.

## How do I apply for the EGUSD Mello-Roos Tax Reduction?

**i** You may request an application by mail, e-mailed or go to our website for the application.

- (1) Complete the application
- (2) Include a copy of your qualifying documentation
- (3) Submit to our office by no later than **June 30<sup>th</sup>**

## When is the reduction effective? Can the reduction be applied retroactively?

**i** The filing period is **April 15<sup>th</sup>** through **June 30<sup>th</sup>** each year. Applications received by June 30<sup>th</sup> will be effective the upcoming tax year, which starts **July 1<sup>st</sup>**. Your reduction is good for one year (July 1 through June 30). **You must re-certify your status each year in order to continue to receive the reduction.**

The County property tax bill runs on a fiscal year calendar, July 1<sup>st</sup> through June 30<sup>th</sup> therefore, with the billing period locked in for the year, EGUSD cannot process retroactive reductions nor make changes mid-year. Any changes made outside of the filing period, will be effective the upcoming tax year.

## Why do I have to re-certify my status each year?

**i** Unfortunately, we have no way of knowing each person's eligibility status year-to-year as things may change throughout the year.

*i.e. The applicant moves out of the area, grandchildren move in, and or the applicant has passed away; therefore, we cannot automatically apply or continue reductions for those reasons.*

## How do I find the EGUSD Mello-Roos tax levy on my property tax bill?

**i** On your Sacramento County property tax bill, refer to the **Direct Levies & Assessments** section, see **Levy # 0155 Elk Grove Unified School Dist CFD 1**.

## When will the EGUSD Mello-Roos Tax end?

**i** Currently, there is no end date.

*EGUSD bonds are on a 40-year term. The 40-year term will start once EGUSD sells its last bond monies; there are still about 50 million dollars left on the bond to sell as of 2019.*

## How is the EGUSD Mello-Roos tax amount determined?

**i** Please refer to the "**Rate & Method of assessing the special tax**" document on our website.

## Who should I contact if I have more questions?

**i** Please contact the designated EGUSD Mello-Roos tax line at (916) 686-7562 or e-mail at [schooltax@egusd.net](mailto:schooltax@egusd.net)

Website: [www.egusd.net/Departments/Facilities-and-Planning](http://www.egusd.net/Departments/Facilities-and-Planning)