## EXECUTIVE SUMMARY - Richmond Tax Revenue Division Engagement of ASC LLC Report Date: July 9, 2025

ISSUE: Tax Revenue Division of Finance - Work Process Improvement Report

#### **BACKGROUND:**

At the request of the Director of Finance, an assessment of the Tax Revenue Division's work processes and management team was performed by Anne Seward Consulting LLC (ASC) to include a "root cause" analysis of customer service complaints received in late 2023 into the early months of 2024. The assessment identified process deficiencies and numerous instances of poor service delivery to customers. Initial findings were documented in a draft report provided in August, 2024. A corrective action plan to provide management and supervisory coaching and service augmentation for vacancies was requested by the Director to build a new service model for the Division to achieve high performance service delivery and strong management tools for course correction. Clear goals were established of accurate and timely service delivery with a high customer service response focus.

A deep dive into the Division's operations revealed a long history of deficient work practices and a lack of technology that led to poor data quality and service processing speed. Key performance management tools were created for line-of-site into work production needs to document the work status and productivity of the Division. **The following management tools were developed and deployed during the engagement:** 

1	Organizational Chart with Key Stuctural Addition of Control Unit	Implemented
2	Leadership Roles Defined for Work Performance Expectations	Implemented
3	Gantt Chart - "Line of Site" to Work Requirements & Deadlines	Implemented
4	Division Workplan for Project Tracking & Management	Implemented
5	Unit Workplans - Communicate Focus, Work Status, Lead Staff, Deadlines, Notes	Implemented
6	Metric Reporting of All Work (Ticket Counts and Service Times)	Implemented
7	Staffing Plans (Focus Resources, Monitor Productivity, Develop Due Dates)	Implemented
8	Leadership Meetings - Review Workplans, Assess Risk, Redirect	Implemented
9	Daily Team Stand-up's	Implemented
10	Unit Teams Chat Channels	Implemented
11	Cultural Expectations & Evaluation Tool for Performance Feedback	Delivered, Not Deployed

Additionally, work process improvements were deployed. Software and data deficiencies were identified creating obstacles to improving work processes and performance standards. Therefore, software upgrades and new technology solutions were fast tracked to replace manual paper tax filing processes adding significant accuracy, speed, and customer service satisfaction. A cleansing of customer data was initiated across tax types. **Actions taken to implement process improvements, software solutions and cleanse system data include:** 

1	Sta	ndard Operating Procedures (71) for Critical Work Processes	34% Published; 52% In Testing
2	Qua	ality Control Review of ALL Work Performed	Implemented
3	Tick	ket Tracking & Daily Reporting of ALL work to be performed	Implemented
4	Ser	vice Level Agreement (SLA) of 7 business days for response to customers	Implemented
5	Me	trics Reporting of All Work Status' for Management's Line-of-Site	Implemented
6	Enh	nanced Customer Service Delivery Offerings	Implemented
	а	White Glove Assistance for Business Filings	Implemented
	b	In-Person & Virtual Appointment Options	Implemented
	C	Ambassador Station Service for Peak Customer Demand Periods	Implemented
	d	Customer Escalation Protocols to Expedite Service Greivances	Implemented
	e	Standardized Customer Service Responses	Implemented
	f	Customer Service Survey Feedback (2.4 to 4.4 star in 6 months)	Implemented
7	Sof	tware Upgrades, Automation of Manual Processes, and Data Cleansing:	Implemented
	а	RVA Business Portal Launch of Tax Filings & Payments Online	Implemented
	b	MUNIS Upgrade & KPMG Forensic Analysis of Business Accounts and Balances	Implemented
	C	RVA Pay Personal Property Vehicle DMV Reconciliation of Tax Records	Implemented
	d	Digital Dashboard Reporting & Analysis	Implemented

Lastly, an assessment of the management and leadership team was performed. The Division's progress during the engagement was due in large part to a small number of highly committed staff members, Supervisors, and Managers who routinely went above and beyond expectations to raise performance standards and pull the weight of the team during the change management process. Their good work continues today. However, cultural deficiencies across all staffing levels also continue and serves as a root cause to Division performance barriers. A lack of service commitment, non-compliance with directives and SOP's, and lack of accountability for job performance are limiting the progress of the team as a whole. Work is routinely passed up to management when obstacles are encountered without adequate demonstration of critical thinking and resolution skills. Far too many instances of missed deadlines, poor work product and inadequate work volumes have been experienced and documented during the engagement. Additionally, instances of insubordination, sabotage and undermining of the team's success and leadership efforts were witnessed routinely. Cultural standards have been developed to curb deficient performance behavior.

Management training and accountability tools have been provided for use in raising service delivery standards and will require consistent leadership by strong managers and supervisors to achieve lasting change.

At the conclusion of the ASC service engagement, all key management tools were developed and deployed with training to those in leadership. Adequate transition services have been provided to achieve the established goals of high performance service delivery of accurate and timely information with a customer satisfaction focus. The performance of the Division will be determined by the will of the management team to utilize the performance tools and practice the skills provided.

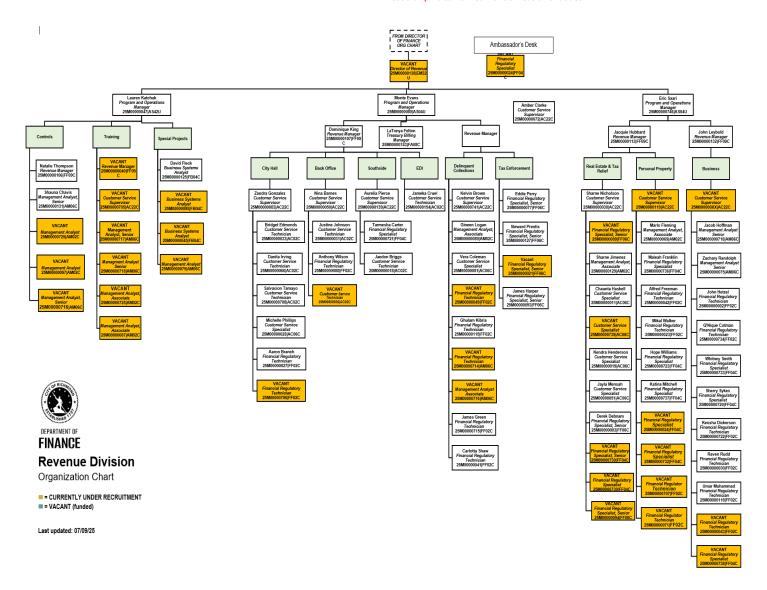
#### **RECOMMENDATION:**

It is recommended that leadership continue to closely monitor and enforce the use of the variety of management tools outlined above. Performance management standards should be upheld with accountability to maintain the course correction achieved thus far and continue the Division's progress.

Additionally, the continued investment and fast tracking of technological solutions via the Oracle system is a critical component to the Division's performance success. The automation and internal control development to keep data current and accurate, and services delivered timely should be the focus of work efforts going forward.

#### **ATTACHMENTS:**

- 1 Division Organizational Chart
- 2 Leadership Roles Defined
- 3 Management Tools Developed
- 4 Standard Operating Procedures Developed
- 5 Division Gantt
- 6 Division Workplan for Project Tracking & Management
- 7 Unit Workplans
- 8 Cumulative Daily Ticket Metric Report
- 9 Completed Daily ticket Metric Report
- 10 RVA Software Project Plan
- 11 RVA Pay SR IR Tracking
- 12 RVA Portal SR IR Tracking
- 13 PACT Culture Defined
- 14 Staff Evaluation Tool PACT



## This documents the lanes for each leadership position for added clarity of accountability and expected focus.

Leadership Roles Defined			Program &	Operations M	lanager		Reve		Supervisor				
Task Description	Sr. Dir.	Dir. Of	Tax	Treasury	Control,	Personal	Delinquent	Business	Cash	Billing	Customer	Unit (Real	Cash
· · · · · · · · · · · · · · · · · · ·	Of	Revenue	Assessments	Billing &	Training	Property	Collections &	(1)	Operations	(1)	Service	Estate / Personal	Collection
	Finance	Admin.	(1)	Collections	&	& Real	Tax	, ,	(1)	, ,	(1)	Property /	Sites (3)
	(1)	(1)	, ,	(1)	Special	Estate	Enforcement		, ,		, ,	Businesss / Delinquent	` ,
	. ,	, ,		, ,	Projects	(1)	(1)					Collections) (4)	
					(1)								
1 Oversees unit staff resources (floor & customer counter); delivers											•		•
work assignments; provides 311 ticket QC; ensures staff training													
and compliance with SOP's / State / Local codes; provides												Х	X
performance management; administers metric tracking and SLA													
compliance; remediates service quality and timeliness issues.													
2 Customer Service Advocacy; ticket escalation, resolution & tracking;													
customer service SOP compliance; ticket QC reviews and													
remediation; customer service training and survey feedback											Х		
remediation; "Cumulative Daily Ticket Report" and "Completed											^		
Daily Ticket Metric Report" review for accuracy, SLA compliance and													
strategies; backup to Unit Supervisors in absences.													
3 Oversees unit functions and supervisory staff's administration and													
resource management; administers and updates all elements of the													
"Unit Workload and Metric Report"; ensures SOP/ State / Local													
Code compliance; ensures the timely and accurate delivery of work													
to meet deadlines; works with P&O to resolve audit findings and						Х	Х	Х	Χ				
respond to audit requests; administers projects and data integrity													
reviews; assesses and implements work process improvements,													
monitors revenue billing and collections to meet compliance and													
budgetary standards.													
4 Oversees Programs and Operations of all Units for Timely, Accurate,													
Efficient, and Customer Focussed Services; ensures all work of		Χ	X - Lead	X - Lead	X - Lead								
Revenue Managers and Supervisors is being performed													
5 Control, Training, & Special Projects: SOP documentation and													
testing; Compliance reviews of SOP's; metric analysis; strategic													
planning development & monitoring; staff training and certification					v								
administration; system access permissions; database registration					Х								
and subscription oversight; contract administration; special projects													
as assigned.													
6 Leave Administration & Service Staffing Coverages						Χ	Χ	Χ	Χ		X - Lead	X - Lead	X - Lead
7 System data integrity and quality control compliance						Χ	X	Χ	Χ		X - Lead	X - Lead	X - Lead
8 Billing of taxes:													
a Real Estate (Bi-annual; delinquent, PSC, PILOT)						Х				X - Lead			
<b>b</b> Personal Property (Annual, monthly supplemental, delinquent)						Х				X - Lead			
<b>c</b> Business (BPP, Business License, Daily Rentals, ATOM, Statutory Invoicing)								Х					
<b>d</b> Letters for NonFilers & Delinquent Accounts							X	Х				X - Lead	
9 Code Compliance & Audit: Review of PPTR eligibility; business													
filings for accuracy and compliance, state database analysis for non-						X - Lead	X - Lead	X - Lead				Х	
compliant registrations and tax reporting													
10 Program & Credit Administration (Tax releif, Exemptions, Grants,						X - Lead	X - Lead	X - Lead				Х	
Incentives, Refunds, Appeals, DSO, Payment Plans, etc.)													
11 Division Oversight of Workplan & Gantt Compliance	Х	X	X - Lead	X - Lead	Х								
12 Meetings & Touchpoints:													

a b	Daily Stand-up Meeting with Front Line Staff (daily): Purpose to review assignments for the day; share any news/work plans; review important SOP reminders or training issues.  Evening Huddle for Status Updates (daily): Purpose to share status updates; important issues or resource / planning details;			X	X							Х	X
С	staffing matters.  Leadership Meeting & Direct Report on Division & Unit Metric & Workplan Progress (weekly): Purpose to review Gantt, Workplans, & Metrics; status of projects; staffing issues; resource management planning; billing & revenue progress; etc.	х	х	X	X	X						X	
d e	Direct Report Meeting on Control & Compliance (weekly): Purpose to review control findings and metrics and develop remediation plans and results. System Software Development Meeting (Mon-Thurs): Purpose	Х	х			X							
12 Co.	to review with software developers the Project Management progress; discuss development milestones, issues & remediations, etc.		X X	X - Lead X	X - Lead X		х	Х	X	Х	Х		
13 CO	mmunity Outreach & Presentations		^	^	^								

Juline	or Management Tools			Program & Operations Mar				Revenue Manager					Supervisor			
	Description		Dir. Of Revenue Admin. (1)	Tax Assessments (1)	Treasury Billing & Collections (1)	Control, Training & Special	& Real Estate	Delinquent Collections & Tax Enforcement	Business	Cash Operations (1)	Billing (1)	Customer Service (1)	Unit (Real Estate / Personal Property / Businesss / Delinquent	Cash Collection Sites (3)		
						Projects (1)	(1)	(1)					Collections) (4)			
1 Me	etings & Touchpoints:					(-/										
a b	Daily Service Team Stand-up Meetings: Purpose to review assignments for the day; share any news/work plans; review important SOP reminders or training issues.  Daily Management Huddle for Status Updates: Purpose to share											Х	х			
с	status updates; important issues or resource / planning details; staffing matters.  Daily System Software Development Meeting: Purpose to review			Х	Х											
·	with software developers the Project Management progress; discuss development milestones, issues & remediations, etc.		Х	X - Lead	X - Lead		Х	X	х	Х	Х					
d	Weekly Leadership Meeting & Direct Report on Division & Unit Metric & Workplan Progress: Purpose to review Gantt, Workplans, & Metrics; status of projects; staffing issues; resource management planning; billing & revenue progress; etc.	Х	x	х	х	х										
е	<b>Weekly Control &amp; Compliance</b> Meeting: Purpose to review control findings and metrics and develop remediation plans.	Х	Χ			Х										
2 Ma	nagement Tools:															
а	Gantt Chart: Documents division major work requirements & deadlines for all Units.	Х	х	Х	Х	Х	X - Lead	X - Lead	X - Lead	X - Lead	X - Lead		Х			
b	<b>Division Administrative &amp; Project Workplan Report</b> : Documents leadership tasks and all Unit projects, assign staff & deadlines, share status and progress notes.	Х	Х	Х	х	Х										
c d	Unit Metric & Workplan Report: Documents individual Unit actions and metrics, assigns staff & deadlines, shares status, and progress notes. Individual billing calendars, taxation rules, communication plans, and other unit specific documentation are detailed in labeled workbook sheets to support continuity of operations and provide line of site to all team members.  Standard Operating Procedures (SOP's): Documents actions,						х	х	x	х	X					
_	assignments, and timelines required to process critical work activities outlined in the Unit Metric & Workplans for each Unit.  Development and testing is provided by an independent Control Unit.					X - Lead	х	х	х	х	Х		X	Х		
е	<b>Cumulative Daily Ticket Metric Report</b> : Documents ticket counts by Unit and SLA compliance; ticket details with staff assignment, category, age, status and service times for resource and performance management.						x	х	х	X		X - Lead	Х			
f	Close of Day Ticket Metric Report: Documents ticket closures by Unit and staff member showing metrics per hour for productivity monitoring and performance management; provides end-of-day metric breakdown for ticket status.						Х	x	Х	x		X - Lead	х			
g	Microsoft Teams Chat Channels: Provides a shared communication location for each Unit and for individual projects for clarity of status and sharing of issues encountered for staff and leadership monitoring.						Х	x	х	x	Х	х	Х	Х		

h	RVA Software Project Plan & SR / IR Tracking: Documents the RVA Software development actions and timelines with status and assignment for alignment of expected automation and staff resource requirements.		х	X-Lead	X-Lead									
i	P A C T Culture Boards: Documents the expected Culture Behaviors embraced by the Team with definition; visual reminders are framed throughout the Division; Leadership uses for coaching and redirection of behavior across team members.	X	x	Х	Х	x	Х	X	X	Х	х	х	х	х
j	<b>Staff Evaluation Document:</b> Performance management tool to document staff performance achievments that ties to the P A C T Culture expectation; rollout is pending the hiring of key leadership positions for strategic behavior modification.	X	х	X	Х	Х	Х	X	Х	х	х	Х	х	Х

City of Richmond Tax Revenue Division SOP Summary Dated: 7-8-25

SOP Status	SOP Count	<u>%</u>
In Development	5	7%
Finalized	5	7%
In Testing	37	52%
Published to Power DMS	24	34%
Total	71	100%

SOP Ref #	SOP Title	Status	Final Draft Power DMS
Administration			
1	Unit Metrics & Workplan Reporting	Finalized	https://powerdms.com/link/CityofRichmond/document/?id=3385275
2	Personnel Administration	In Development	https://powerdms.com/link/CityofRichmond/document/?id=3385276
4	Front Counter Customer Service Administration	Published	https://powerdms.com/link/CityofRichmond/document/?id=3193854
4-002	RVA311 & RVAPay311 Ticket Administration	Published	https://powerdms.com/link/CityofRichmond/document/?id=3193856
5	Refund Requests - Real Estate, Businessand Personal Property	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3399278
6	Address Corrections & Returned Mail - All Tax Types	In Development	
7	P&I Waivers - All Tax Types	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3404932
9	Document Management-Treasury/Cash Operations	Published	https://powerdms.com/link/CityofRichmond/document/?id=3385285
9A	Document Management-Control/Business/Real Estate an Personal Property	In Development	
11	Employee Access - All Units	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3397854
12	Release of taxpayer information to third parties	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3256960
13	Payment Research	In Testing/Under Assessment	https://powerdms.com/docs/1980348/revisions/2537593
14	Unidentified Suspense Checks	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3385286
15	Attendance Management	In Development	
Control Unit			
101	Audit Discovery	Published	https://powerdms.com/docs/2260528/revisions/2878145
102	Tax Audit Program (Resources & Appeals)		https://powerdms.com/docs/2260536/revisions/2878154,
			https://powerdms.com/docs/2447706/revisions/3104919,
		Published - Under Assessment	https://powerdms.com/docs/2445506/revisions/3102172
Cash Operations			
201	Cashiering & Payment Processing	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3488643
201a	Invoice Cloud Payment File	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=2454776
201b	BPOL Payments	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=2453637
201c	E-Box	Published - Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=2454592
201d	Pay-in Submittals	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3403881
201e	Check 21 Upload	Published	https://powerdms.com/link/CityofRichmond/document/?id=2453110
202	Cigarette Tax Stamps	Published	https://powerdms.com/link/CityofRichmond/document/?id=2209293
203	Mailroom Operations (Include Returned Mail Here)	Published	https://powerdms.com/link/CityofRichmond/document/?id=2478653
204	Rvapay nightly settlement process - new process added	Published	https://powerdms.com/link/CityofRichmond/document/?id=3325592
205	RVAPay Daily Settlement Process	Published	https://powerdms.com/link/CityofRichmond/document/?id=3325592
206	RVAPay Daily Settlement Process - Dropped Receipts	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3406410
Real Estate	Will by Suny Section City Section Sect	iii resting/ onder / issessinent	netps// powerumstem/ mmy ere or merimental accumenty . to 3 100 120
301	Annual billing	Finalized	https://powerdms.com/link/CityofRichmond/document/?id=3385647
302	Supplemental billing	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980616
303	Delinquent billing	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980629
304	R.E. Roll Corrections (Abatement, Adjustments, Taxable Status, Ownership, Address)	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980610
305	R.E. Public service corporation	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3385649
306	R.E. PILOT Invoicing	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3385650
		In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=3070370
307	R.E. Affordable Housing Trust Fund Taxation	in resting/order Assessment	https://powerums.com/iink/Cityorkichhonu/document/fid=5070570
200		In Tasting/Under Assessment	
308	R.E. Tax Relief Application & Recertification	In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980385
Personal Property	R.E. Tax Relief Application & Recertification		https://powerdms.com/link/CityofRichmond/document/?id=1980385
Personal Property 401	R.E. Tax Relief Application & Recertification  PPT Annual, Supplemental & Delinquent Billing	Finalized	https://powerdms.com/link/CityofRichmond/document/?id=1980385 https://powerdms.com/link/CityofRichmond/document/?id=3392105
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Personal Property 401 402 403 404 405 406	R.E. Tax Relief Application & Recertification  PPT Annual, Supplemental & Delinquent Billing PPT One Off Bill Generation PPT Tax Corrections PPT DMV File Record Upload PPT Lease Administration PPTR State Relief Program	Finalized In Testing/Under Assessment In Testing/Under Assessment In Testing/Under Assessment In Development In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980385 https://powerdms.com/link/CityofRichmond/document/?id=3392105 https://powerdms.com/link/CityofRichmond/document/?id=3392106 https://powerdms.com/link/CityofRichmond/document/?id=3392107 https://powerdms.com/link/CityofRichmond/document/?id=3392108 https://powerdms.com/link/CityofRichmond/document/?id=3392109
Personal Property 401 402 403 404 405 406 407	R.E. Tax Relief Application & Recertification  PPT Annual, Supplemental & Delinquent Billing PPT One Off Bill Generation PPT Tax Corrections PPT DMV File Record Upload PPT Lease Administration	Finalized In Testing/Under Assessment In Testing/Under Assessment In Testing/Under Assessment In Development	https://powerdms.com/link/CityofRichmond/document/?id=1980385 https://powerdms.com/link/CityofRichmond/document/?id=3392105 https://powerdms.com/link/CityofRichmond/document/?id=3392106 https://powerdms.com/link/CityofRichmond/document/?id=3392107 https://powerdms.com/link/CityofRichmond/document/?id=3392108
Personal Property  401  402  403  404  405  406  407  Business	R.E. Tax Relief Application & Recertification  PPT Annual, Supplemental & Delinquent Billing  PPT One Off Bill Generation  PPT Tax Corrections  PPT DMV File Record Upload  PPT Lease Administration  PPTR State Relief Program  PPT Change of Address	Finalized In Testing/Under Assessment In Testing/Under Assessment In Testing/Under Assessment In Development In Testing/Under Assessment Finalized	https://powerdms.com/link/CityofRichmond/document/?id=1980385  https://powerdms.com/link/CityofRichmond/document/?id=3392105 https://powerdms.com/link/CityofRichmond/document/?id=3392106 https://powerdms.com/link/CityofRichmond/document/?id=3392107 https://powerdms.com/link/CityofRichmond/document/?id=3392108  https://powerdms.com/link/CityofRichmond/document/?id=3392109 https://powerdms.com/link/CityofRichmond/document/?id=3482069
Personal Property  401  402  403  404  405  406  407  Business  501	R.E. Tax Relief Application & Recertification  PPT Annual, Supplemental & Delinquent Billing PPT One Off Bill Generation PPT Tax Corrections PPT DMV File Record Upload PPT Lease Administration PPTR State Relief Program PPT Change of Address  Bus. License Application, Renewal & Certificate Issuance	Finalized In Testing/Under Assessment In Testing/Under Assessment In Testing/Under Assessment In Development In Testing/Under Assessment Finalized  In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980385 https://powerdms.com/link/CityofRichmond/document/?id=3392105 https://powerdms.com/link/CityofRichmond/document/?id=3392106 https://powerdms.com/link/CityofRichmond/document/?id=3392107 https://powerdms.com/link/CityofRichmond/document/?id=3392108 https://powerdms.com/link/CityofRichmond/document/?id=3392109 https://powerdms.com/link/CityofRichmond/document/?id=3482069 https://powerdms.com/link/CityofRichmond/document/?id=3385629
Personal Property  401  402  403  404  405  406  407  Business  501  502	R.E. Tax Relief Application & Recertification  PPT Annual, Supplemental & Delinquent Billing PPT One Off Bill Generation PPT Tax Corrections PPT DMV File Record Upload PPT Lease Administration PPTR State Relief Program PPT Change of Address  Bus. License Application, Renewal & Certificate Issuance Bus. Peddlers License Application, Renewal & Plate Issuance	Finalized In Testing/Under Assessment In Testing/Under Assessment In Testing/Under Assessment In Development In Testing/Under Assessment Finalized  In Testing/Under Assessment In Testing/Under Assessment In Testing/Under Assessment	https://powerdms.com/link/CityofRichmond/document/?id=1980385 https://powerdms.com/link/CityofRichmond/document/?id=3392105 https://powerdms.com/link/CityofRichmond/document/?id=3392106 https://powerdms.com/link/CityofRichmond/document/?id=3392107 https://powerdms.com/link/CityofRichmond/document/?id=3392109 https://powerdms.com/link/CityofRichmond/document/?id=3392109 https://powerdms.com/link/CityofRichmond/document/?id=3482069 https://powerdms.com/link/CityofRichmond/document/?id=3385629 https://powerdms.com/link/CityofRichmond/document/?id=3385630
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INESS Annual BPPT Filing, Billing	week 1 week 2	week 3 week	k4 week1 week	k 2 week 3 week	4 week1 we	ek 2 week 3 weel	k4 week1 w	eek 2 week 3 we	ek 4 week 1	week 2 week 3 week	week 1 week 2	week 3 week 4	week1 we	eek 2 week 3	week 4 v	week 1 week 2	week 3 wee	ek 4 week 1	week 2 week	3 week 4	week 1 wee	ek 2 week 3 w	eek 4 week 1	week 2 wee	ek 3 week 4	week 1 week	k 2 week 3
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Beginners Adjustments & Credit Refunds																										BEGINNER ADJSTN	MTS & CREDITS
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DMV File Download/Upload/Run (Prior Month/Week Activity)	Monthly weekly fill by 7th; weekly	e weekly file weekly	file Monthly by weekly 7th; weekly file	file weekly file weekly	file Monthly by week 7th; weekly file	dy file weekly file weekly	y file Monthly wee by 7th; weekly file	kly file weekly file wee	kly file Monthly by 7th; weekly file	weekly file weekly file weekly fi	le Monthly weekly fill by 7th; weekly file	e weekly file weekly file	Monthly wee by 7th; weekly file	rkly file weekly file v	eekly file Mo 7ti 60	onthly by weekly file h; weekly e	weekly file weekl	y file Monthly by 7th; weekly file	reekly file weekly	file weekly file t	Monthly week by 7th; weekly file	ly file weekly file wee	eldy file Monthly by 7th; weekly file	reekly file week	dy file weekly file h	Monthly weekly ny 7th; weekly file	y file weekly fil
Monthly PPT Supplemental Billing (Prior	file Jan DMV file (Dec	payment due 15th							-	April & payment		payment		pice payment		invoice	payment	-	tvoice paymer rint/mail by due 15	nt .	involo	oe payment		invoice payer	nent		te payment
Month)			***	& March DMV file (far	. Each anti-stud Burn with	Annual Wills				April & payment due 15th file of Supplimts invoice print/mail by 15th	invoice print/mai by 15th	I due 15th	prin by 1	oice payment nt/mail due 15th 15th		print/mail by 15th	due 15th	) 1	rint/mail by due 15i 5th	th	print/ by 15	payment mail due 15th th		invoice paym print/mail due 1 by 15th	15th	print/n by 15th	ce payment /mail due 15th ith
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Renew Contracts JDPower; DMV; Game & nland Fishery					DMV Acces	2 YR	DMI Aco	/ 2 YR			IDPower Renew PO by 7-1		Portal JDPower Renew PO by 7-1														
					Accer Rene 14-21	ws 4-	Ren 14-3	rss ows 4- -7			by 7-1		by 7-1														
ESTATE Annual Tax Relief Program Applications		applici print/	tion mail						reminder mailing to									reminder mailing to									
Semi-Annual Real Estate Billing	payment due 1/14	by 1/3						invo prin by 4	applicants ice t/mail		payment due 6/14							applicants						CAMA file received by 15th	invoice print/ mail by 11/30		
Monthly Real Estate Voluntary Escrow								Бу 4	/30								coupe	ons						y 15th	11/30		
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Semi-Annual Real Estate Bank Lender Billing	bank payment file due 1/14							file: to b by 4	ice ient anks		bank payment file due 6/14											reci ban pro	elve ik perty file by		file sent to banks by 11/30		
Semi-Annual Real Estate Delinquent Billing	1/14		Invoice		pirym due :	ent		by 4	/30		6/14		Invo	pice		payment due 8/14		le le	woice Print		paym	10/ ent 10/14	file by 30	-	by 11/30		_
			Print & Mail by 2/14										Prin Mai 7/14	nt & il by 4		due 8/14		9	Mail by /14		due 1						
Monthly Real Estate Supplement Billing	payment due by 20th	Assessmt invoice file received print/ by 20th of prio month 20th	/ payment mail due by 20th	Assessmt invoice file print/ received mail of by 20th prior month	due by 20th	Assessmt invoice file print/ received mail of	due by f 20th	Assessmt invo file prin received mail by 20th prio mor	ice/ payment t/ due by 20th of	Assessmt invoice/ file print/ received mail of by 20th prior month b	payment due by 20th	Assessmt invoice/ print/ file mail of prior received month by 20th	payment due by 20th	Assessmt in file p received p by 20th b	voice/ pa rint/ mail of du rior month 20	syment se by Ith	Assessmt invoic file print/ received mail of by 20th prior monti	payment due by 20th of	Assessr file receive	print/ or mail of in prior month by	payment due by 20th	Assessmt invention file print received mail by 20th price more	oice/ payment nt/ due by il of 20th	Asses file recei	ssmt invoice/ p print/ d wed mail of 2 th prior month by	ayment lue by Oth	Assessmt file received
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Semi-Annual PILOT Billing	Jan value compiled for billing								invoice print/mail by 5/1		payment due 6/34										invoice print/mail by 10/1						
Semi-Annual Public Service Corp. Filing, Billing										invoice print/mail of 2nd 1/2	payment due 6/14							5 a	CC sends ssessment / etes by 15th					true-up invoice print/mail by 11/15			
Annual Posting of Property Tax File to Open QUENT COLLECTIONS										billing														y 11/15		RE Roll	Il Book Publicati
Delinquent PPT File to VaTax																							File Upload to				
Delinquent RE File Bellato & PPT to TACS Collectors	Pile																						Off	-			-
Collectors	to Collectio																										
Upload of RE Revision File to Bellato & PPT to FACS Collectors	n Co. File File Uplos Upload on Fri.	on Fri. on Fri.	load file Upload file on Fri. Upload	File File I on Upload on Upload	File Upload File on on Fri. Uplo	File File ad on Upload on Upload	File File d on Upload on on I	Upload File File ri. Upload on Uplo	File Upload ead on on Fri.	File File File Upload on Upload on Upload o	file file upload on Upload or	File File Upload on Upload on Fri.	File File Upload on Uplo	File F oad on Upload on o	le Upload File on Fri. on	le Upload File o Fri. Upload or	File File Upload on Uploa	File Upload F	ile Upload File n Fri. Upload	file I on Upload on I		ed on Upload on Upl	oad on Upload on	File File Upload on Uploa	File f ad on Upload on U	že řže Ipload on Upload	File ad on Upload or
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ransmit VRW fees to DMV		Fees to	DMV	Fees to DMV		Fees to DMV		Feet DM1	to	Fees to DMV		Fees to DMV			ies to DMV		Fees t DMV	10		Fees to DMV			s to V		Fees to DMV		
eposit of DSO Payment File	Deposit provided on 16th		Deposi provide on 16th	t ed	Depo provi on 10	sit ded lith	Dep	osit rided loth		Deposit provided on 16th	Deposit provided on 16th		Dep prot	vided 16th Deposit provided		Deposit provided on 16th		0	eposit rovided on 6th		Depo provi	sit ded lith Deposit provided		Deposit provided on 16th		Deposi provide on 16ti	it ded ith
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NISTRATIVE Annual Credit Refund Issuance													ĺ													lusiness / Persona	nal Property Cr by 12/31
Annual Evaluation of Staff												Employee Performance															uy 12/31
Annual Training Plan for Staff												Evals Training Plan Registrations												+			+
Annual Training Flant for Start											1	egnoscoffi			port			_									_

DOCUMENT PURPOSE: For use by Leadership & Program & Ops Managers to track and communicate administrative items & PROJECT WORK across all units. THIS SHOULD NOT HOLD ROUTINE UNIT WORKPLAN TASKS which are to be documented in the Unit Workplan & Metric Reports. Completed project work is tracked below to memorialized accomplishments and keep record for reference purposes. City of Richmond Finance Dept - Revenue Administration Division Status Date: Wednesday, July 2, 2025 Notes/Comments Assigned To Priority Start Date **Due Date** (H, M, L) I LEADERSHIP ADMINISTRATIVE ITEMS A Upcoming Council Agenda Items: B Items to Share from Senior Leadership: (CAO, DCAO, Dept Director) C General Items for Discussion: 1 Vacancy Tracking: Vacant / No Activity Vacant But In Recruitment Unit Control Unit TRS Cash Operation TRS Delinquent Collectio TRS Tax Enforcement ASMT Business Operation viewed 142 Invoices on 06/06/2025; Pending Scheduling of Interview ASMT Personal Property riewed 142 Invoices on 06/06/2025; Pending Scheduling of Inter ASMT Real Estate RE-Customer Service Supervisor Offer has been provided to HR on 06/17/2025, pending a response/follow-u 2 Training Plans: a Customer Service Ambassador Certification for Front Line (Reynolds Program) Lauren 4/9/2024 10/1/2025 SW to take lead fr Amber to completion | CG would like to assist as part of training and development buildout - 4.24: Met 4/23 JA and LK to develop schd May 2 - NT to work w 3 Staffing Follow-ups / Productivity / Enforcment Measures REOPENED a SOP: Staff break limit monitoring/phones/snacks to breakroom Amber ongoing b Directive: Staff In/Out Boards for Accountability REOPENED Accountability Required Amber Η ongoing REOPENED Need documented methodology for all units in 1 SOP: RE priority 1 as of 4.24 c Directive: QC required for all unit work Unit Spysr/CG Н ongoing Amber will lead daily review and escalate to Jamie for non-compliance or other issue d Directive: Daily Ticket Metric Report; Batch Processing by SME; Productivity Accountability Unit Spysr Н REOPENED ongoing e Vacancy Filling Monte/ SW Н ongoing ongoing f Team Leave Calendar Oversight & Compliance Need to enforce RAPIDS approval process SW Н 9/13/2024 ongoing g SOP: Escalation Oversight Amber Н 9/13/2024 ongoing h Directive: USe RVAPay/Portal for ticket response; no email/ VM due to issues with monitoring Н 5/29/2025 Directed 3 times: SW directed all work to tickets and closure of email access points for customer line of sight Team Need to enforce this with Supvsr on the Cust Svc Line at all times - SOP update published 6.3.2025 - LK i Directive: Customer Ticket Entry for Counter Service - ALL customers into a ticket LPK Н ongoing j Directive: P&O on the Floor for Oversight ME Н ongoing Needs enforcement Needs enforcemen k | Directive: Cumulative Daily Ticket Report & Closed Ticket Report Amber Н ongoing l Directive: Customer Counter - Supervisor/Manager present @ ALL TIMES Amber Η 3/1/2025 ongoing II PROJECTS TRACKING: A ADMIN: 1 Evaluation Form Alignment & Culture Rollout 7/24/2024 6/30/2025 Culture Rolled Out; Anne draft of Eval tool complete; HR approval received; Enneagram tests provided to staff; need leadership settled for rollout of eval tool and culture AS Need to review for close-out | Control Group would like to assist as we build out our assessment calendars 2 Audit Comment Close Out - Review and Draft for SW Jeff C M 10/18/2024 ongoing B TECHNOLOGY / AUTOMATION: 1 Work Process Improvements & Automation of Manual Processes a Automation - CAMA updates to MUNIS/RVAPay Jacquie 4/4/2024 12/30/2026 Waiting on access to new tax assessor software 12/30/2026 wait for RVAPay implementation given timing b Automation - Tax Relief Program Application & Recertification 4/4/2024 Jacquie Н Automation - Daily Rentals (BU MUNIS implementation) John M 9/1/2024 10/30/2025 wait for RVAPay implementation given timing 2 Software Implementation RVA Pay (Transition fr MUNIS) - (List below) "High" priorities worked; "Med" in process a RVA Pay PPT Remediations Anne 7/1/2024 8/31/2025 10/30/2025 b Next Module - Business / ATOM Anne M 11/1/2014 c Next Module - Real Estate TBD M 1/1/2026 12/30/2026 Per Eric: Allows City to maintain Vendor's current software version. Will also correct problems with Delinquent Letter Export function - CG Team needs more info on the upgrade d "MUNIS Upgrade to Version 2024.2.0.1199 (current 2024.2.0.730) ES Н 6/5/2025 6/23/2025 and responsibilitie C TRS - Cash Operations SR 13099067 to calculate interest due for refunds 1 Interest refund automation functionality in RVAPay RVA Developers TBD 9/30/2025 Currenty in two settlement processes. Needs to be condensed in one. Sent over to Monte to get his input to shorten 2 Daily Settlement Process SOP - RVAPAY Heather / Dominique 8/1/2024 3 WPI - Payment Reversal/NSF Process Monte Н 4/8/2025 10/31/2025 04/09/2025: Presented the slide deck during the 4:30pm Daily RVAPay Meeting to discuss the current workflow and recommended workflow for process improvement/internal controls. UAT Testing with a Productionn date pending in May 2025; Refunds will be the last module built; cashiering has to be finished for all modules to eliminate IATs; 6/18/25 SR to be sent to Michelle/BT by Monte educate the public to file online with VI (pull a report of taxpayers who pay via manual check); no coupons to be issued in 26'; involve large co. early; get OSC involved 4 ATOM Payments in VI -educate the taxpayer with filing VA Interactive to pay Monte / JL Η 2/20/2025 10/1/2025 5 OPEX Scanner Upgrade Monte 5/15/2025 10/1/2025 working with Heather (Teasury) on a replacement machine Review the workflow to expedite the process to upload lockbox files when a business has not certified and its delaying the positing of payments; Monte to develop the workflow and 6 WPI for RVA-Munis/Personal Property Lock box Uploads John/Dominique/Bonita TRP Н 6/11/2025 work with WF (Heather) to have the PPRVA and Munis import files to be seperated. Current work around, is items will be internally marked as certified, so payments can post, but list will still be sent to business unit to "whiteglove" Monte to complete the authorization form that will allow Dominique to perform payment reversal; however, with this process, Dominique is not allowed to adjust charges and/or 7 WPI - RVAPay - Reversal Access Monte/Dominique Н 6/12/2025 6/20/2025 etc to accounts/invoices; We will work with IT to update the business process so receipt reversals are sperate from billing/charge adjustments. D ASMT - Business 1 Compliance Project - State Accesses to Support Audit/Statutory (IRMS, SCC, ABC, Health) Lookup 6/17-SCC access available to all. IRMS access must be requested. John L. has access as do some in Deliquent Collections. No recent progress on adding more BU staff members John L. M 7/1/2024 TBP ABC licenses are public. Health Licenses access needs more work. 1/30-JL and ES work with DJ 604 List and LaTonya SW authorized stat assmt to be 20% incr. 6/17-Need Description 2 Compliance Project - Air BnB tax remittance status report to SW John/Prentis М 10/15/2024 TRP 6/17-Need Description 3 Compliance Project - PPTR Eligibility Verifications (no bus. Use/Uber/Lyft) TBP 9/1/2024 4 Unposted Payments - Suspense Status & Dominion 3 checks unposted Eric & Dominique Н 5/5/2025 checks were posted to past due accounts Complete NO OICS on the stret; 2-5 remaining need to have the information by no later than Friday, June 6, 2025 604 accts, Payment Allocation OIC Closure Eric Н 3/1/2024 2/28/2025 6 MUNIS Data Scrub & Corrections / KPMG Conversion Work / Credit Refunds JL 5/30/2025 KPMG taking lead, SCRUB & Research stage completion 5/7/2024 a 877 BPP Accounts Requiring Historic Tax Correction JL M 1/15/2025 TBP b 39 25' New Business Lic. entered to MUNIS not RVAPortal JL Η 2/20/2025 TBP c 25' New Business Lic. set up but no ATOM set up (2/20 email to JL) JL 2/20/2025 TBP d KPMG Result Processing & Credits Resolved Eric 5/15/2025 5/30/2025 н

F. Control Unit Start Data End Data

JL

JL

JL

Monte/Zach

Н

Н

9/26/2024

5/13/2024

6/2/2025

3/21/2025

4/15/2025

9/30/2025

Paymt Allctn team; draft letter approved by SW. Need update from Eric

Temps to work on this, 225 total impact, 2/28/25 is initial due date

6/17-Remove from Workplan Out of Statute. 3.20: Eric to schedule follow-up briefing; updated fr 11-30-24; 1128 credits PRESCRUB with 225 POSTSCRUB for review by

3.20: Sweep of accounts after KPMG finishes their audit; John & Eric meeting 12/12/2024 to discuss. Plan in place, will be with refund team. Need to complete SCRUB first.

This is a State Code not an agreement and covers all adjacent localities; need list of affected properties for current monitoring; need system solution in Portal build out.

e Credit Balance review, notification, refunds

8 Work Process Development - Credit balance refunding Ordinance Compliance

9 Work Process Development - RVA & shared zip locality ALM Parcel/Split of Revenue Disbursement

7 RVA Portal OC & UAT

1	ontroi Unit			Start Date	End Date	
	Kiosks for Front Counter for Service Ticket Entry by Customer	LPK	M	5/1/2024	9/1/2025	functionality like Gen Assmbly Café'. Meeting 12/13/2024. looking at 2 vendors Jan 6th. Eric to get with Thomasena to schedule - Is this still Control Group ie Special Projects'
	· ·			*******		No Special Proj staff at this time
2	SOP Document Management Project	LPK	Н		7/30/2025	See project plan in Masterlist: , Once outstanding SOPs complete- will transition into Doc Assessment phase and SOP management
	a SOP Development	LPK			7/30/2025	3-4 High level need completion - See Masterlist for update on outstanding SOPs - Temps starting 7/1 will begin work on outstanding SOPs one DMS access granted, expected 7/7
	Address corrections		M		7/11/2025	Intend to work with SME upon return, however if they do not return by 7/7 will assign to new temp for completeion by 7/11
	Lease Administration	Mehmed/Dacia - Assist from NT	Н	7/3/2025	7/30/2025	Working through SAPR submission with Developers, Lease Management/roles module not listed in Role Management Portal
	Document Management	LPK - Assist from Nisha	Н	6/23/2025		Will require an updated RevAdmin policy IDing electronic record keeping standards and definitions before an official procedure can be developed - Working to
	b SOP Training			0/23/2023	TBD	Identifying existing training and their locations to pull into SharePoint Project ongoing workingwith Jacob to obtain sign off documentation that includes
		NT	Н		7/30/2025	
	SOP - Business License Accounts Uploaded to OpenData Portal Monthly	JL / Lauren	M	3/18/2025	TBP	SOP created - updating will occur once licenses approved and can confirm an accurate document.
	SOP Bank Franchise (new State process/drawdown)	JL/Q'nique	M	5/1/2024	6/25/2025	Lauren will document process in SOP. JL to train Q as SME delegation; JL has trained Q - SOP exists in DMS:
	SOP - Credit balance refunding Ordinance Work Process Development	NT	H	7/2/2025	7/30/2025	3.20: Sweep of accounts after KPMG finishes their audit; John & Eric meeting 12/12/2024 to discuss. Plan in place, will be with refund team. Need to complete SCRUB first.
3	Customer Service Survey Reporting & Performance Report to Council	LPK	Н	9/15/2024	TBP	Get survey functionality in RVAPay? Control Group would like to assist with this
	RVA 311 Foundations Project	Amber - LPK	M		TBD	Group to inform customer service - Lauren has been added to these meetings now that the 311 CSR project has moved into a controls based framework, due dates governed by
	RVAPay Staff Training	Amber	Low	5/12/2025	8/29/2025	CG looking to assist with training and development - will work with Amber and Natailie
	Strategic Plan Development	Katchuk, Lauren P FIN	High	4/4/2025	6/27/2025	Added to Wednesday Agenda with Kris and Monte to refine, seek feedback, develop OKRs and KPIs
	SharePoint Development	Fleck, David R. /LK	High	4/15/2025	8/31/2025	Starting with "Control Group" page - meeting with DIT on Tuesday, SharePoint Site is active - working with Robert Half to Secure talent for 2 month build. working to bring
	Time Clock Roll Out	Fleck, David R. /LK	High	4/15/2025	8/30/2025	Timekeepers -Shamaine - who can help up in HR to determine what the different levels are - what are options?
	Access Controls RVA Pay and other system access.	Fleck, David R. /LK	Critical	4/28/2025	7/15/2025	Lauren will provide the list of people - Request to DIT made. RVA Pay lists received 5.19, MAJOR access issues. Moving status to critical starting 5.20.2025. Met with ISO 5.
		n, Natalie L Finance, Katchuk, Laure		4/24/2025	10/1/2025	Setting up collaborations and timeline -
11	Email Encryption of Attachments Katch	ık, Lauren P FIN, Fleck, David R F	Medium	6/9/2025	12/31/2025	Work with Eric and DIT - looking for solution to encrypt external data (look at NeoGov - used for submitting tax forms at hiring)
12	Testing for Scanning	Katchuk, Lauren P FIN	High	5/5/2025	7/15/2025	May have impact on OPEX project - moving date to accommodate Opex procurement/staff schedule need to reach out to Heather Smith for touch base
13	COSO Risk Management	Katchuk, Lauren P FIN	High	4/16/2025	7/31/2025	Brown Edwards initial review, Rev Admin responsible to work with BE to identify and provide any items/information BE think is mission for needs further information - awaitin
	Refund Team	Thompson, Natalie L Finance	High	5/12/2025	ongoing	Refund team - reduce outstanding Refunds and streamline processes - about 87 checks cut/sent as of 5/30 - on-going - no new checks to cut until 6.30 due to rebate project.
		Lauren P FIN, Thompson, Natalie L.		6/11/2025	6/30/2025	ID participants and work to get registered who is this for? Ask at 7/3 meeting - work with Shauna on registration and payment
	-	-				Goal of the project is to assess current as of 7/1 org chart to reallocate positions into correct cost centers, postion codes, and align with updated job descriptions fe
	Org Chart/HR alignment for position reallocations to facilitate hiring	LPK	High	7/1/2025	TBD	and contest con centering position could make make the apparent part descriptions to
	RS - Delinquent Collections				0.04.7777	wing to account from the force account and BRI Colombia (confirmed to C. 2012). The
	Delinquency Letter	Kelvin	Н	4/11/2025	8/31/2025	review the process of how the fees are generated and P&I Calcuated (pending updates from RVA PayTeam
2	Debt Set Off (DSO)				8/1/2025	
	a workflow	Kelvin	H	4/11/2025	8/1/2025	Research and review the workflow and process; frequency for submitting files to the state
	b letters	Kelvin			8/1/2025	formt correction for the letters (template) dollar thresholds (amount due=>\$5.00 and no zero invoices printed)
	c DSO Codes	Kelvin		5/1/2025	8/1/2025	Reviewing data pull by DIT on DSO Codes at the Customer level and Invoice level to expedite the refund process
3	Reconciliation of TACS Flags, DSO, DMV Holds to Source for Accuracy Confirmation	Kelvin	Н	5/1/2025	9/1/2025	Pending follow up from the RVA Team on the recommendatins made by ME
	DMV Purge Records	Monte/PP Team	Н	5/29/2025	9/1/2025	Process on how to make adjustments to a PP account when a record has been purdged from DMV.
		Kelvin/Gineen/Lauren		6/12/2025		Review the Document Rention/Purdge Process and develop a project plan work OT to scan/store the files
	Document Rention/Purge		H		12/31/2025	SOP and renewal dates for all contracts.
	Contracts - JDPower, Game & Inland Fisher, DMV, etc	Gineen	H	6/17/2025	7/15/2025	
	Mailroom Coverage when Carol is out on leave	Kelvin/Perry/Arron/Laurnen	Н	6/17/2025	7/1/2025	Training with Perry and Arron on the process and coverage when Carol is out of the office and processing of all mail in the mailroom. Updating/Creating the SOP and process
	Notary Licenses	Kelvin/Gineen		6/17/2025	7/31/2025	notary updated for staff per signoff for collections.
	TACS-MUNIS/RVA Pay Upload Layout	Monte/Latonya		7/3/2025	7/31/2025	work with TACS on the file formate for uploading MUNIS/RVAPay files that are uploaded the TACS FTP Website
G T	RS - Tax Enforcement					
1	TAX Sale	Monte/Atty. Greg Lukanuski	Н	6/9/2025	9/30/2025	Review the State Statue. Richmond Code, RVA SOP, and Procedure/Process for Tax Sales/Delinquent Collections
	Tax Sale Payoffs	Monte/Laurin	Н	6/9/2025	On Hold	Why are we cutting a check via OnBase to apply to Munis for Tax Sales
	SMT - Personal Property			0.7.2020		
	RVAPay Billing Catch Up & Corrections (No JDPower, SIG, PY corrections) see PP Billing Plan Tab	LaTonya /Linette	M	9/15/2025	6/30/2025	see PP Billing Tab for planned billing order
						25' Billing. Credits were system redistributed up to 24' bal. only due to errors in Cash recon; leaves approx 3300 credits to be processed after verification (Cash Op recon pend
2	Credit Balance Distribution (Billing Redistribution Stopped due to Cash Recon pending)	LaTonya/Linette	M	10/7/2024	6/30/2025	2 James, Cream with system reasonable and the control of the contr
3	Refund Scrub (reconcile refunds denied without DMV verification)	Gineen / Amber	Н	12/10/2024	TBA ASAP	SW wants update on 12-13. Gineen & Amber sent email to Bonita & Team.
	Lease Company Corrections	Med	Н	2022	TBA ASAP	3.20: Dan & Linette to meet; Need status of SOP that Dan developed
	RVAPay Ticket Category Mapping & Bulk Closure Solution	Anne / Bonita	Н	6/2/2025	6/15/2025	reducing to remove duplicates & streamline; see PPT workplan Tab for details; 6/30: still waiting on BT to complete
	Streamline of PDF's (11 various / too busy / error prone)	Supvsr / Billing Mngr	M	6/16/2025	10/1/2025	These need modernization and update
	Non-Profit Flag Recon to DMV	TBA	M	10/1/2025	TBA ASAP	Staff created a work around w/out approval in 24' billing to add TE flag in order to remove VL and many did not return the flag; RAA bill in 25' ex. of errors; "0" means taxabi
'	Non-Front Flag Recoil to Diviv	IBA	IVI	10/1/2023	IDA ASAF	RVAPay (see rules)
8	Personal Property Returned Mail Ja	cquie, LaTonya, Carol, Nina, Antho	Н	7/3/2025	TBA ASAP	Scan the returned mail in the OPEX Machine (50-100 Pages. Each) Training the staff on updting addresses (taxpayers must update in DMV unless TEMP for Deloyment, etc)
I A	SMT - Real Estate					
	Annual Credit Refund Distribution	Jacquie	$\overline{}$			
			M	10/15/2024	4/1/2025	2/20: In Docusign, meeting to standardize packets; 2/6: 100 remaining; Verify any existing credits are in compliance with City Code. In progress, CA is accepting
1	2025 Rehate Checks		M H	10/15/2024	4/1/2025 6/16/2025	2/20: In Docusign, meeting to standardize packets; 2/6: 100 remaining; Verify any existing credits are in compliance with City Code. In progress, CA is accepting Sent to AP, currently being printed; remediation team created 5/22
	2025 Rebate Checks	Lauren	Н	5/22/2025	6/16/2025	Sent to AP, currently being printed; remediation team created 5/22
3	SOP - RVA Stay GAP Grant Program	Lauren Jacquie & Lauren	H H	5/22/2025 5/1/2025	6/16/2025 TBP	Sent to AP, currently being printed; remediation team created 5/22  AP process formalized. First 14 checks issued on 06/02/25 SOP in process with Lauren to onboard for approval.
3 4	SOP - RVA Stay GAP Grant Program UAT - Reversal Module	Lauren Jacquie & Lauren Sharne & Chaunta	H H H	5/22/2025 5/1/2025 5/14/2024	6/16/2025	Sent to AP, currently being printed; remediation team created 5/22  AP process formalized. First 14 checks issued on 06/02/25 SOP in process with Lauren to onboard for approval.  UAT Testing for payment reversals in RVA PAY
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16 DDT DMS/	Dodood	Н		Gl-t-	
16 PPT DMV records upload for 17' forward	Reshard	H	7/25/2024	Complete	
17 BU & PPT Desk Audit - Backload Inventory	Leadership		7/26/2024	Complete	DDT To be a least of the
18 Onboarding Training PPT's New Staffing Process & PPT / Training Plan	Amber	M	7/1/2024	Complete	PPT Template complete; Units customizations done
19 PPT Bill PDF update for Address Change Alignment to DMV records)	Bonita	M	444.5400.04	Complete	Form link to Assessors office directly now
20 RE WPI - Address Change w/ Assessor	Brittany	M	4/15/2024	Complete	Form link to Assessors office directly flow
21 BU & PPT QC of Work / Workpaper documentation standards	Team	H	6/1/2024	Complete	
22 BU Desk Audit - Clear Backlog of Filings	Team	H	7/1/2024	Complete	
23 Office Clean Up (Filing, Computer Equipment, Records Archive)	Team	H	7/8/2024	Complete	
24 Staff Leadership Relocation Plan	Leadership	Н	7/8/2024	Complete	
25 WPI - Scanning of Mail to Tickets	Anne / Amber	M		Complete	U. S. Marie
26 BU Business Lic Print - weekly intervals	John L/ Zach A.	M	6/1/2024	Complete	weekly print from MUNIS
27 BU Suffolk SME WPI	Anne / BU Supvsr	Н	9/11/2024	Complete	Connection made and ongoing
28 PPT Returned Mail Processing - Automation / Remediation Plan	Gineen	Н	10/1/2024	Complete	1600 automated flag prior to delinqunt billing
29 BU PDR Business License Backlog	John L	M		Complete	
30 Finalized Org Chart w/ Roll Details	Sheila	H	6/30/2024	Complete	Rollout11-12-24
31 PPT DMV weekly/monthly download & upload & exception clearing	Gineen	H	7/1/2024	Complete	weekly & monthly downloads by Sue; uploads TBD
32 All Units SOP Development Plan	Leadership	H	7/12/2024	Complete	
33 All UnitsSupervisor Training Plan	Amber	M	4/9/2024	Complete	schedule approved by TG/JA to begin in Jan 25'
34 All Units Annual Training Plan - all staff	Amber	M	7/1/2024	Complete	schedule approved by TG/JA to begin in Jan 25'
35 All Units Mandatory HR Trainings	Amber	H	9/23/2024	Complete	
36 All Units Employee Performance Log Training & SW expectations	Sheila / Amber	H	10/18/2024	Complete	Template completed and deployed
37 All Units Gantt Chart Development & Blackout Periods	Anne	H	10/7/2024	Complete	
38 Payment Lockbox Transition to WellsFargo	Heather	Н	3/1/2024	Complete	both lockbox's are on; positive pay TBC by 3/25'
39 BU Daily Rentals 24' Review/ Catch Up processing	John L / John H	Н	10/7/2024	Complete	
40 BU Bank Franchise catch up processing for 24'	Zach A / BU Supvsr	H	10/7/2024	Complete	files purged and new files complete
41 BU BPOL Incentive Program - Update Application	Anne / BU Supvsr	M	10/15/2024	Complete	box added to new BL form; posting TBD on 12/15
42 BU Payment Suspense Clearing of Backlog	Zach R / BU Spvsr	Н	10/7/2024	Complete	
43 RE Tax Relief 24' Audit of Applications	Brittany	H	9/1/2024	Complete	
44 Desk Audit of Check Deposit Status	Dominique	Н	7/26/2024	Complete	
45 New Business Beginners Adjustments (21', 22', 23')	John L	Н	9/26/2024	Complete	updated fr 11/30; 1200 TBP, remove 604OIC's; no API fr Serge to hit IRMS possible; letter to TG pending; apply cr to other tax due; cut cr checks for 21'; SOP & video
46 Forms Automation of Business Forms	John L / Zach A	H	10/1/2024	Complete	ATOM completed, ATOM coupons need to be coordinated with Heather & Bonita- create touchpoint with Bonita on 4:30 12/12
47 Standardized Template Letters to Customers	Heather	Н	9/1/2024	Complete	closed- Approved by Thomasena in Power DMS
48 Business Filing Clean Up: Purge / 3 Years backfiling	Carole	M	10/1/2024	Complete	update fr 11/15; Filing complete; purge of 19' in process; Checkout boards pending order
49 Personal Property Flag Audits (Non-profit; TACS flags)	Jasmine	Н	10/1/2024	Complete	updated fr 11/15; TACS complete; Nonprofits completed, Nonprofit pending review. Gineed to get with Raj to match RVAPAY with report provided. Gineen to work with Eric to
50 Forms Automation into 311 Ticket (P&I Waiver, Address, Refunds, BPOL, All Forms, etc.)	Raj	Н	5/5/2024	Complete	partially complete. Open items are 2 forms with Raj/Tina. BPP forms will move into RVAPAY with phase 2. eff 12/19- Amber is 311 contact- communicate directly with Amber
51 Business Non-Filer Follow Ups & Compliance Demand Letters for 21'	John / Kelvin	Н	9/26/2024	Complete	completed 12-13-24
52 RVAPay BPP/BPOL Ph 1: NEW BUS LIC APPLICATIONS ONLINE	Bonita/Anne	Н	12/4/2024	Complete	
53 Customer Service Survey Deployment	Amber/Jacob	M	5/1/2024	Complete	Survey is complete and deployed to customer-facing desks. Amber is managing/Jacob is data support/reporting
54 Va Interactive Expansion- all tax types	John L	Н	9/1/2024	Complete	MUNIS to add new tax type for TID; 2/5/25 SW authorized to hold on TID MUNIS and implement in RVA Bus Portal GO LIVE
55 Metric 311 Reporting - Ticket Summary (Cumulative-a.m.; Completed-p.m.)	Jacob	Н	6/1/2024	Complete	Report is now accurate
56 Teams White Glove Business Owner Apptmts w/ BU staff	Zach R.	M	10/11/2024	Complete	1/16/2025-Continuing issues, urgent completion, Chad/Zach R. /JL New Business Accounts first; staffing capacity plan needed.
57 Software Upgrade MUNIS (4 versions behind, no support after 7-1-24)	Eric	Н	5/20/2024	Complete	Complete, but some outstanding issues remain for resolution, tickets are with Tyler
58 Payment Plan Expansions (City Council requested)	John L / SW	Н	9/1/2024	Complete	Council request at GovOps; Slide to be prepared; Using max thresholds per Code.
59 State Database Crossmatch of Business Registry	Kelvin	Н	4/16/2024	Complete	1/30-TG completed and has presentation. Update: Met with Thomsena SCC is and has been available, we logged into State database with a current business. Powerpoint
60 SOP: Delinquent Collections "Redeem Properties	Natalie	M	4/21/2025	Complete	SOP development for Redeem Properties process - includes obtaining access to OnBase
61 COSO Risk Management/SOP framework project	DR/LPK	Н	3/31/2025	Complete	Daniel Rhoades and Lauren working through established and drafted SOPs to identify key controls and risk management issues and applying to spreadsheet for City Wide Financial
62 DMV VIN True Up Recon. File	Anne	M	7/1/2024	Complete	Requested Tyra Pyat? at DMV Requested & sent application in mid-November 2024. Need download of 10 years of history for disposals & purge
63 Payment Transaction Fee Removal	Heather / Dominique	Н	summer	Complete	3.20: VA Interactive needs tio invoice the city for those; InvoiceCloud to remove fees April 2
64 22' RE Rebate Checks	Brittany	Н	12/12/2024	Complete	2/20: formatting issues, will work with Chad to remedy; 2/6: Brittany needs to get file to Dominique; need update from AP regard go to unclaimed property that needs to be
65 MUNIS SCRUB: April /May 25' GR QC of Cash Ops for accuracy in MUNIS; Daily QC review forward	JL/Sherri	H	5/5/2025	Complete	Daily review ongoing per JL; no errors found as of 5/29/25.
66 SOP Refunds	Natalie/Jacquie/Lauren	H	6/15/2024	Complete	3.20.25; Needs to be tested by Natalie. Eric has final for PowerDMS load. Final has been distributed to PP Unit. Trainings and SOPs saved at: GARVAPAY Refund Support
67 Proactive Site Compliance Audits & Citation Tracker; Incorporate Court Cases	Kelvin	Н	4/16/2024	Complete	Tracker complete, team has been trained on how to use and are expected to use daily after we complete Taxpayer engagement and Outreach currently taking place (new portal).
68 Staffing Acknowledgement: Confidentiality Agreements; SOP's	LPK	Н	5/16/2024	Complete	Complete for SOP#1.2; will need staff confirmations at close of SOP project -Put in Power DMS for e signature 4.24.25 - Will Use DMS for 2026 - 2025 NDC Complete and
69 Cash Reconciliation - 24' and monthly forward	Heather / Dominique	Н	8/1/2024	Complete	3.20.25: Barb & Med working with recon app; SR 13108116, SR13051782 open recon related RVAPAY tickets for additional functionality. General Accounting Cash Recons are
70 SOP: Customer Account Verifications by Staff - Protocol & Training	Lauren	Н		Complete	Language provided by AS to Kris for deployment; status unknown; need ALL team trained and SOP updated - Draft in DMS as of 4/28, Lauren is working with Dan to update the
71 PPT Book Publication online	Amber	Н Н	10/1/2024	Complete	AS incorporated into Billing SOP Tab; 25' File to post at end of 25' billing production; update 6/11: AS advised by Gabe code says must make available not that it be published;
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 moor		-0/1/2027	Complete	

This documents an example of a Unit Workplan for the Personal Property Tax Unit. These files are to be kept current in a shared Teams location for all 7 units of the Division. They document all work to be performed routinely each year to include metric counts and volumes to be processed, ticket status, revenue collection metrics, due dates, staff assigned and SOP links are documented for line-of-sight to all leadership levels in Teams. Additionally, various tabs contain critical information for continuity of operations and important facts (billing calendars details, taxation rules and reminders, communication documents, etc.) for access and reference.

/orkload l	Metrics Tracking							LEGEND:	BLUE =	Data entry required
ersonal Pr	roperty Unit									
it Update:	7-7-25 by LF		To Be Processed	Completed	% Complete	Count / Remaining	Due Date	Assigned To:	SOP Ref	Notes:
Count	Personal Property Billing:			•	•					
	25' PPTRA Rebate % Rate Calculation		1	1	100%	-	1-Feb	Billing Mngr	#	Provide VIN # & Value after Jan DMV file run to Jeff for PPTRA calc
	25' Purchase "JD Power Official Used Car Guide" & "JD Power Offical Older Used Car		1	1	100%	-	1-Feb	Billing Mngr	#	Purchase Order by Eric S. in 5/25
	Guide" - Eastern Edition for front counter customer service questions									
e 25 PP lling Tab	25' Tax Year Billing, Mailing & Public Advertisement		1	1	100%	-	15-Apr	Billing Mngr	#	Bill mailing by 4-22 to meet 45 day billing window before 6/5 due date
ning ran	25' Delinquent Billing		1	0	0%	1	August	Billing Mngr		Bill in July with 30 day billing window
	24' Delinquent Billing (Remaining VIN's on Billing Calndr tab)		1	0	0%	1	August	Billing Mngr		DMV Scrub Project
	PY Tax Correction Billing (Clean up Billing per Billing Calndr tab)		3	0	0%	3	July	Billing Mngr		DMV Scrub Project
	All YR's Credit Balance Redistribution to Outstanding Bills; Then Notice of CR Balance Remaining	to Customers	1	0	0%	1	August	Billing Mngr		
4,600	Returned Mail Scan to Opex for Flagging		4600	0	0%	4.600		Billing Mngr		Scan to OPEX and Send to Developmt Team for Flag Placement to account
7	DMV File Download/Upload/Run/ Manual Exclusion Exception Clearing (4 Weekly & 1 Monthly)					1,000			#	
	January (Dec Weekly + Monthly Data) - included in Annual Billing		5	5	100%	-	7th Monthly	Suc		
	February (Jan Weekly + Monthly Data) - Included in Annual Billing		5	5	100%	-	7th Monthly	Suc		
	March (Feb Weekly + Monthly Data) - Included in Annual Billing		5	- 5	100%	_	7th Monthly	Suc		
	April (March Weekly + Monthly Data) - Included in Annual Billing		- 5	5	100%	-	7th Monthly	Suc		
	May (April Weekly + Monthly Data) - Included in Annual Dining			5	100%	_	7th Monthly			
			3	3		-	7th Monthly			60000 L L L DI DI DI C L L L L L L L L L L L L L L L L L L
	June (May Weekly + Monthly Data)		3	0	100%	-	July Annually			6/17/25: Amber pending DMV access for Marlo/herself to upload monthly.
	6 Month June True Up File		1		0%	1				
	July (June Weekly + Monthly Data)		5	0	0%	5	7th Monthly			
	August (July Weekly + Monthly Data)		5	0	0%	5	7th Monthly			
	September (Aug Weekly + Monthly Data)		5	0	0%	5	7th Monthly			
	October (Sept Weekly + Monthly Data)		5	0	0%	5				
	November (Oct Weekly + Monthly Data)		5	0	0%	5	7th Monthly			
	December (Nov Weekly + Monthly Data)		5	0	0%	5		Supvsr/RevMngr		
	6 Month Dec True Up File		1	0	0%	1	Jan Annually	Supvsr/RevMngr		
	Supplemental Billing & Mailing - DMV Monthly File (Prior Month Data)								#	
	Feb - April in the Annual Billing (Jan - March Data)		3	3	100%	-	15th Monthly	Billing Mngr		
	May (April Data)		1	0	0%	1	15th Monthly	Billing Moor		
	June (May Data)		1	0	0%	1	15th Monthly	Billing Mngr		
	July (June Data)		1	0	0%	1	15th Monthly	Billing Mngr		
e 25 PP	August (July Data)		1	0	0%	1	15th Monthly	Billing Mngr		
ling Tab	September (Aug Data)		1	0	0%	1	15th Monthly	Billing Mngr		
	October (Sept Data)		1	0	0%	1	15th Monthly	Billing Mngr		
	November (Oct Data)		1	0	0%	1	15th Monthly	Billing Mngr		
	December (Nov Data)		1	0	0%	1	15th Monthly	Billing Mngr		
	January (Dec Data)		1	0	0%	1	15th Monthly	Billing Mngr		
	25' Personal Property Rollbook - Annual Posting		1	1	100%	-	1st of June	Billing Mngr	#	RVAPay Report Tab built to satisfy State Code requirement per Gabe, CA office.
Count	Revenue Progress	As of:	Tax Levy	Budgeted	Collected	Levy Collectecd	Budgeted Collected	Subledger Reconciled to	#	
						Collecteca	Collected	GL Status		
95,761	25' Annual Billing + Supplementals YTD	6/20/2025	\$54,993,993	\$43,921,839	\$33,774,526	5				236K VINS in FY 24' compared to 195K VINS in FY 25' post DMV scrub
/INS;	25' Motor Vehicle Licenses + MV Supplementals YTD	6/20/2025	\$7,554,438	\$8,403,000	in value above					
33,630 Bills	Subtotal:		\$62,548,431	\$52,324,839	\$33,774,526	3476	65%			
DIIIS	25' Delinquent Billing	6/20/2025	\$0	\$9,890,886	\$0	#DIV/0!	0%			
	W. L. a. V. a. L. W. a. a. L.	## WAR	0	0007	% SLA	Weiting On	Waiting on	Waiting on	Cross	
	Ticket Metric Reporting	1/3/2025	Open Tickets	OOSLA	Compliant	Refund, Transfer or P&I Process	Customer Contact	Team	Check of Formula	
7	In Process		142	142	0%	100	42	100	= 142	
	Assigned / Not Started		529	485	8%	313	0	529	= 529	
	Total:		671	563	16%	413	42	629	671	
er Items	Tracking:					Origin Date	Due Date	Assigned To:	Status	
1	Lease Vehicle Reconciliation					8/24	TBD	Mehmed		Will begin 07/11/2025
	SOP Development & Update					6/24	6/25/2025	LK		
3 1	Membership Agreements Admin (JD Power -annual PO / DMV Access 2 vr agmit / Game &	Inland Fish)				7/24	15th of Apri			6/4/25: DMV lapsed in 24, again in 25; this is a 2 yr agreement renews 4/15 via email fr DMV; JDPower annual C
4	TACS & Non-Profit Reconcilation to RVAPay					7/24	TBD	PP Supvar		
5	24' CR balance review/notification due to 25' Billing Redistribution "HOLDS" (approx 3,300 see b)	oilling tab)				5/24	TBD	Billing Mngr		Cash Ops had not reconciled payment errors so could not apply 24' CR to 25' bills
6	Review / restrict access to Tax Adjustment & Bill Generation to SME & Supervisor					5/25		PP Supvsr		
7	Map all tickets into the new "Sub bucket" titles to support batch processing Import DataMatx NCOA file & run returned mail OPEX after into RVAPay to flag accounts (see billing					5-15-25		PP Supvar		
8	Import DataMatx NCOA file & run returned mail OPEX after into RVAPay to flag accounts (see billing)	g tab)				5/25		Linette Jones		
9	Weekly training to review SOP's with team; Processing Rules; Cust Syc Templates					5/25		PP Supvsr		
10	DMV Scrub Bucket #2 (24' & backward reconciliation of billing; see billing tab)					4/25		Team LJ/AS		
11	SME Assignment of Tickets					5/25		PP Supvar		
	QC of Tickets Worked - Document in SOP					2/25		PP Supvar		
	22 VIN's fr Henrico emailed to Sue (311 Ticket entry directed) need back billing correction					5-15-25		Sue / Amber		
13	to RIC. No ticket ability in RVAPay be no RIC account until June DMV file upload (May									
1										
1	correction dates).									
	correction dates).									
MPLETI	correction dates).					8/24	1/1/2025	Raj / Bonita	Complete	
MPLETI	correction dates).					8/24	1/1/2025 3/15/2025	Raj / Bonita Linette	Complete	
MPLETI	correction dates).  E:  Penalty and Interest Ordinance change SR.					8/24				

## City of Richmond - Finance Department Cumulative Daily Ticket Report - 07/08/25

Tax Season Goals:	Average Number of Da	ays Outstanding - 7	Percentage of Tickets	s in SLA - 80%
Revenue Standards:	Average Number of Da	ays Outstanding - 2	Percentage of Tickets	s in SLA - 99%
Total Outstanding	Outside of Service Level	Panalty & Interest	Average Number of Days	Percentage of

	Unit	Total Outstanding	Outside of Service Level Agreement	Penalty & Interest Tickets	Average Number of Days Outstanding	Percentage of Tickets in SLA
			Agreement	TICKELS	Outstanding	TICKELS III SLA
P	ersonal Property	737	562	30	30.02	24%
R	eal Estate	1747	1569	52	36.16	10%
В	usiness	602	159	11	7.99	74%
C	ash Operations	36	30	6	32.31	17%
D	elinquent Collections	44	25	11	13.66	43%
Ta	ax Enforcement	0	0	0	0.00	100%
P	ayment Allocation	365	342	5	27.87	6%
0	ther	25	19	1	32.52	24%
To	otal	3556	2706	116	28.93	24%,

### Going Out of SLA

Business		Delinquent Collecti	ions	Personal Proper	rty	Cash Operations	s
7/9/2025	124	7/9/2025	1	7/9/2025	28	7/9/2025	0
7/10/2025	133	7/10/2025	6	7/10/2025	25	7/10/2025	3
7/11/2025	82	7/11/2025	2	7/11/2025	31	7/11/2025	3
7/12/2025	0	7/12/2025	0	7/12/2025	1	7/12/2025	0

	Real Estate	Payme	nt Allocation	Tax Er	forcement	Other	
7/9/2025	51	7/9/2025	6	7/9/2025	0	7/9/2025	4
7/10/2025	41	7/10/2025	5	7/10/2025	0	7/10/2025	0
7/11/2025	26	7/11/2025	5	7/11/2025	0	7/11/2025	2
7/12/2025	0	7/12/2025	0	7/12/2025	0	7/12/2025	0

Unit	Name	Notes	Day Tickets Complete d	Day Hrs Worked	Overtime Tickets Complete d	Overtime Hrs Worked	Total Tickets Complete d	Total Hrs Worked	Per Hr Rate	SOP Ticket Metric Per Hour	Over/Und er Metric
BU	redacted	000	0	0			0	0	0.00	3	-3.00
BU	redacted	tickets	18	7.5			18	7.5	2.40	3	-0.60
BU	redacted	training/tickets/BPI	13	7.5			13	7.5	1.73	3	-1.27
BU	redacted	Testing/Escalation	0	7.5		l	0	7.5	0.00	3	-3.00
BU	redacted	tickets	3	7.5			3	7.5	0.40	3	-2.60
BU	redacted	000	0	0			0	0	0.00	3	-3.00
BU	redacted	tickets	15	7.5			15	7.5	2.00	3	-1.00
BU	redacted	000	0	0			0	0	0.00	3	-3.00
BU	redacted	000	0	0			0	0	0.00	3	-3.00
BU	redacted		4				4	0	0.00	3	-3.00
		Business Unit:	53	37.5			53	37.5	1.41	3	-1.59
CU	redacted	BU refunds	0	7.5			0	7.5	0.00	4	-4.00
CU	redacted	BU refunds	0	7.5			0	7.5	0.00	4	-4.00
CU	redacted	Refunds	0	7.5			0	7.5	0.00	4	-4.00
CU	redacted	r ioi di ido	Ō				Ö		0.00	4	
		Payment Allocation:	0	22.5			O	22.5	0.00	4	-4.00
DC	redacted	RE Tickets - GAP	16	7.5			16	7.5	2.13	5	-2.87
DC	redacted	tickets	2	7.5			2		0.27	5	-4.73
DC	redacted	tickets	10	7.5			10	7.5	1.33	5	-3.67
DC	redacted	000	0	0			0		0.00	5	-5.00
DC	redacted	Front Counter	4	7.5			4	7.5	0.53	5	-4.47
DC	redacted	tickets	1	7.5			1	7.5	0.13	5	
DC		nquent Collections:	17	37.5			33	37.5	0.88	5	-4.12
PP	redacted	nquent conections.	11	7.5			11		1.47	4	-2.53
PP	redacted	QC	12	7.5			12	7.5	1.60	4	-2.40
PP	redacted	QC	0	7.5			0	7.5	0.00	4	-4.00
PP	redacted	tickets	9	7.5			9	7.5	1.20	4	-2.80
PP	redacted	tickets	14	7.5			14	7.5	1.87	4	-2.13
PP	redacted	tickets/front counte		7.5			13	7.5	1.73	4	-2.13
PP	redacted	000	0	0			0	0	0.00	4	-4.00
PP	redacted	000	0	0			0	0	0.00	4	-4.00
PP	redacted	QC	8	7.5			8	7.5	1.07	4	-2.93
PP	redacted	Front Counter	17	7.5			17	7.5	2.27	4	
	reducted	Personal Property:	84	60			84	60	1.40	4	-2.60
RE	redacted	000	0	0			0		0.00	5	-5.00
RE	redacted	front counter/ticket	-	7.5			11		1.47	5	-3.53
RE	redacted	000	0	0				0	0.00	5	-5.00
RE	redacted	000	0	0			Ö	0	0.00	5	-5.00
RE	redacted	tickets	14	7.5			14	7.5	1.87	5	-3.13
RE	redacted	tickets	15	2.5			15	2.5	6.00	5	1.00
RE	redacted	trokoto	0	2.0			0		0.00	5	
11111	readeled	Real Estate**:	56	17.5			40	17.5	2.29	5	-2.71
TE	redacted	tickets	2	7.5			2	7.5	0.27	1	
TE	redacted	scanned mail/ticke		7.5			3		0.40	1	
TE	redacted	tickets	0	7.5			0	7.5	0.40	1	
	, oddoted	Tax Enforcement:	5	22.5			5	22.5	0.22	1	
co	redacted	000	0	0			0	7.5	0.00	3	
co	redacted	tickets	0	7.5			0		0.00	3	
co	redacted	SS location	1	7.5			1		0.13	3	
	.0000000	Cash Operations:	1	15			1	22.5	0.04	3	-2.96
TOTAL		ousir operations.	216	13			216	175	1.23	22	-20.77
			210								

		Daily Ticket	Activity					Waiting On	:		
	Start			End of		End of	Refund				
Unit	of	Added	Closed	Day	OOSLA	Day	Check	Customer	Team	Notes:	
PP	701	1 119	84	736	537	736			736		
RE**	1792	9 60	56	1796	1502	1796			1796		
BU	545	96	58	583	221	583			583		
CO	34	. 0	1	33	25	33			33		
DC	40	17	17	40	19	40			40		
TE*	0	0	0	0	0	0			0		
PA	303	5	0	308	176	308			308		
Total	3415	297	216	3496	2480	3496	0	0	3496		
*TE Offic	care closa Busine	see Tickate									

	tal Development Plan	Th	is docu	iment is	to prov	vide task							Develo	pment	Project f	or			
Ipdated:	7/7/2025					workfor	ce coo	rdinatio	n and	functio	onality n	eeds.							
uthor:	Anne Seward & Bonita Turner															Dec	Apr		
																to	to	Tech	
ategory	Action Item	1-Mar	1-Apr	15-Apr	1-May	15-May	1-Jun	15-Jun	1-Jul	1-Aug	15-Aug	1-Sep	1-Oct	1-Nov	1-Dec	Mar	Jun	Resource	Status
ieneral	SOP Development & Training to Dashboard	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Х	Control Unit	In Progress
POL	New Business License Approval Processing	Х																Srinivas	Complete
POL	Provisional License E-mail to customers	Х																Pavan	Complete
eneral	Import File of MUNIS Active Accounts	Х																Mahesh	Complete
eneral	Third Party Representative Registration	Х																Srinivas	Complete
L Billing	Statutory Assessments - BPOL	Х																Venu	Complete
L Billing	Statutory Assessments - BPP	Х																Venu	Complete
L Billing	Late Fees - BPOL	X																Venu	Complete
L Billing	Late Fees - BPP	X																Venu	Complete
L Cashiering	Payment File Portal- BPP	X																Venu	Complete
L Cashiering	Payment File Portal- BPOL IAT Forms - BPP	X																Venu Venu	Complete
L Cashiering L Cashiering	IAT Forms - BPOL	X																Venu	Complete Complete
eneral	Create Support Ticket for each filing - BPP	X																Narayana	Complete
eneral	Email to Customers for Corrections/Issues	^	Х															Srinivas	Complete
POL	New Physical License Release		^	Х														Pavan	Complete
PP	Setting up New BPP Accounts			X														Srinivas	Complete
L Cashiering	Stop Gap Cashiering Module			X														Mahesh	Complete
L Casillerilig	KPMG provides summary of Munis table			^														iviallesii	Complete
PMG Scrub	totals as of May 1st (clean slate for RVAPay)					Х												KPMG	Complete
Julius	KPMG builds adjustment tables for import					^												KF IVIU	complete
PMG Scrub	into RVAPay					Х												KPMG	Complete
L Cashiering	CORERP Reconciliations - Rekas					^	Х											Harsha	Complete
eneral	Dashboards/Metrics						X											Bonita	In Progress
L Adjustments	Refund Processing						X											Srinivas	Complete
L Adjustments	CORERP Refunds Automation						X											Harsha	Complete
L Billing	BPP Interest Ordinance						X											Narayana	Complete
L Billing	BPP Penalty Ordinance						X											Narayana	Complete
L Adjustments	Receipt Corrections						X											Venu	Complete
L Adjustments	Reversals						X											Venu	Complete
L Adjustments	Customer Corrections to filings						X											Srinivas	Development
POL BPP	Waiver of P& I (BPP / BPOL)						X											Narayana	Complete
L Cashiering	BPP Cashiering							Х										Srinivas	UAT
L Cashiering	BPOL Cashiering							X										Srinivas	UAT
L cusinering	Missed Filings & Bal Due Automation for																	Similar	OAT
udit	Compliance Monitoring - BPOL Licenses							Х											Complete
L Adjustments	Tax Corrections - BPP							X										Venu	Development
L Adjustments	Tax Corrections - BPOL							X											Development
POL	Backport BPOL Functions (support tickets)								х										Development
101	Report of Customer Filing Variances - year																	Ivarayana	Development
udit	over year									х								Raj/Harsha	
POL BPP	Version 2.0 BPOL with converted data									X								Srinivas	
POL BPP	Tie MUNIS Accounts to RVAPay / COR ERP									Х								Raj/Harsha	
	Notice of portal statement balance/ history																	,	
ieneral	access to customers (portal email & mailing)									Х									
	BPOL Economic Development Incentive																		
L Adjustments	Credits									Х								Salmon Khan	
.,	Missed Filings & Bal Due Automation for																		
udit	BPOL Compliance Monitoring - BPP & BPOL									х									In Progress
	Recon of MUNIS to RVAPay using KPMG Audit																		
POL	Date to A/R)									Х									In Progress
	Support Automation of Closure of Business																		<u> </u>
BPOL BPP	Accounts									х									
	Recon of MUNIS to RVAPay using KPMG Audit																		
PP	Date to A/R)									Х									In Progress
	MUNIS SHUT DOWN FOR BPP (no PY in																		
PP	MUNIS) * CONTROLS NEEDED FOR BPOL									Х									
	AI - BPOL Auto Official License Generation																		
POL	based upon compliance									Х									
eneral	Streamline Customer Registration Entry									Х								Srinivas	
PT	PP V 2.0 (see "RVAPay SR IR Tracking" tab									Х									
том	Tie MUNIS Accounts to RVAPay / COR ERP									Х								Raj/Harsha	
	Recon of MUNIS to RVAPay using KPMG Audit																		
ТОМ	Date to A/R)									Х									
eneral	Al Development											Х	Х	Х	Х	Х			
	MUNIS SHUT DOWN FOR BPOL/BPP (no PY in																		
POL BPP	MUNIS)												Х						In Progress
	Communications Plan - ATOM Conversion																		
том	into RVAPortal													Х					
том	ATOM Release (self report) - Customer Facing														х				
	MUNIS SHUT DOWN FOR ATOM (no PY in																		
том	MUNIS)														х				
том	ATOM Release Back Office															Х			
	BU Tax Types Remaining: Public Service and																		
S / DR / BF	Daily Rentals/Bank Franchise															Х			
L Billing	General Billing Items (DPU, P&R, PAYINS)															Х			In Progress
Ē	Real Estate Development																Х		_
	Connect to Advanced Collections for AR																		
elinqColl	management/delinquent processing																Х		In Progress
																			_

RVA Pa	RVA Pay Development			This document is a "project SR IR" tracking and not a formal IT		LEGEND:	edit needed		
	Tracking	c /40 /2025		SR IR per Michelle Barclay. AS used the chat to identify issues			NS-Not Started		
Author		6/18/2025 Anne Sev		and discuss at the daily Development team meetings.			IP-In Progress C-Completed		
	SR / IR #	Priority	Issue	Description	Origin	Completion	Status:	Staff Rep	Notes
		(H / M / L)			Date	Date			
IR TRA	IR	Н	SIG Assessed Value Coding Correction	Billing anomalies exist due to code issue with SIG VINs. A sweep to correct was applied as part of the 25' billing to generate accurate bills but Assessed Values dont always hold when a bill is regenerated (ex. ticket). STOP GAP is to tax correct the Assessed Value. Various issues occur to include: 1) doesn't degredate by \$100 annually. Script written for 25' billing. Bills should degredate by \$100 annually and team are to tax correct until permanent fix as STOP Gap.	5/28/2025		NS	П	
2	IR	Н	For Hire Billing Table Correction	Gross Reciepts or # of vehicle rules need correction to properly compute tax due. See email fr JacobH on 5/15/25 @ 9:57am	5/15/2025		IP-5-28-25 12:35pm	Srinivas	
3	IR	Н	VIN on BIll in Error (8 record not pulled fr DMV)	DMV import to RVAPay; Staging table does not update to Master table	5/28/2025		NS		6/17: test file pending June DMV upload
4	IR	Н	DMV 8 Record Not Accurate per Customer	Some 8 Records from DMV are not accurate per customer; staff verify this to DMV screen.	6/16/2025		NS	LJ	Needs investigation
5	IR	Н	VIN Missing from Bill - DMV Scrub						
6	IR	Н	Bill Calculation Error	Multiple Statements = Hang Up Bill Calculation and Assessed Value Disappears	5/28/2025		NS	П	
7	IR	Н	P&I Generation After MUNIS Yr Receipt Balance Transfer - STOP GAP	Recasting of P&I when receipt is transferred to another bill. When receipt is unapplied and transferred (overage paid), Interest is triggered improperly; stop gap tool on Reports / "IPCC Bills Interest/Penalty Correction" created to drop in the bill # hAssessed Valueing the issue to recast and correct.	5/28/2025		NS	n	
8	IR	Н	Vehicle Table & Bill Table Assessed Value Field Dont Match	If not verified as matching before tax correcting (staff are to verify before tax correction), will remove Assessed Value on VINs; query built with update; sweep performed of all accounts and remediated; nightly sweep is stop gap until deep dive fix			NS		
9	IR	Н	Add Class Code Value for Trucks/Trailor for Hire	Class code missing from "One Off Bill" in Tax Corrections	5/28/2025		NS	LJ	
10	IR	Н	Add rule for Assessed Value Floor of \$100	Create Assessed Value floor to not allow value to drop below \$100 and to annually decrement by \$100. SR needed to change value assessment to Al.	4/1/2025		NS		
11	IR	Н	Duplicate Title/VIN Rule Correction	Vehicle table needs correction to not allow duplicate titles.	5/28/2025		NS	П	
12	IR	М	Disabled Vet Tax Status Consolidation	Consolidate prior MUNIS classifications (5+) the tax status classification of these in RVAPay for consistency.	4/1/2025		NS		
SR TRA									
1 2	SR SR	H	Bill Generation Speed NCOA Temporary Address	SPEED UP BILL GENERATION PROCESS!! Automate the NCOA address file update from DataMatx into	4/1/2025 4/1/2025		NS NS		
3	SR	н	Rule Update  Back Billing Coding Update	RVAPay. Write code to overwrite the temporary address field to blank once a DMV match address is provided. Update the billing rule to backbill VINS brought in via DMV file	4/1/2025		NS		
			to CY + 3	with prior period taxation required to current year plus 3 prior years. Per LJ, the program rule provided was current year plus 1 prior year NOT ALIGNED TO STATE CODE.					
4	SR	Н		IF 1 account & prop ID is associated with duplicate VIN in same tax year, VIN needs and exception review. This occurs when DMV record did not remove a VIN as it should.	6/3/2025		NS	IJ	
5	SR	Н	TACS PDF Notice Update	Bills printed for TACS accts do not say they are in TACS and allows customer to send payment to RIC to process correct this.	4/1/2025		NS		
6	SR	Н	Automate Non-tax/ Tax	Automate any "6" tax adjustment made to "nontaxable" or	4/1/2025		NS		
7	SR	М	Relief Status Roll Forward DMV Exclusion Automation	"releif" status to the roll forward in Annual Billing in RVAPay.  Automate the remaining manual "exclusion" review process for liability dates and class codes in RVAPay.	4/1/2025		NS	Saerge	
8	SR	М	Prorated Locality Table Update	Update the Non-prorating locality table in RVAPay.	4/1/2025		NS		
9	SR	М		Add a "historical NADA table for prior years as reference to explain Assessed Value swings to customers.	4/1/2025		NS		
10	SR	М	Streamline Ticket Category Descriptions	Streamline Ticket Categories to remove duplicates and improve work assignments	6/1/2025		NS		
11	SR	М	Automate Tax	Create automation to handle corrections/adjustments for	6/1/2025		NS		
12	SR	М	Corrections/Adjustment Automate Refund Process	efficiency/accuracy.  Create automation to handle refund steps for	5/15/2025		NS		
13	SR	L	Customer Communication Alert	efficiency/accuracy.  Email capture needed for customer tickets / portal only communication by team; no external emails; response by customer should attach and "activate" a "customer response"	4/1/2025		NS		
14	SR	L	QC Review Tracking Button	flag" when customer responds.  Create a flag/button to document QC review by Supvsr on tickets worked					
Autom	ation Quest	ons:							
?	Request	L	DMV Version Consistency	DMV access screens are different for the staff and need	4/1/2025		NS		
?	Access	L	to Staff Access Restrictions to	Ability to restrict access to PPT leads of Marlo, Mikal, Katina	5/5/2025		NS		
?	Request Is more automation	Н	SME's Automate DMV File Upload/Run	for ticket processing.  Automate the weekly and monthly DMV file upload to run.	4/1/2025		NS		
	available				4/1/2025		NS		

RVA Portal Dev	•		This document is a "project SR IR" tracking and not a formal IT		LEGEND:	edit needed		
R & IR Tracking	3		SR IR per Michelle Barclay. AS used the chat to identify issues			NS-Not Started		
ast Update:		7/7/2025	and discuss at the daily Development team meetings.			IP-In Progress		
Author:		Anne Seward				C-Completed		
Count SR / IR#	Priority (H / M/ L)	Issue	Description	Origin Date	Completion Date	Status:	Staff Rep	Notes
IR TRACKING:								
1 IR	Н	BPP De-certification	Problem with APP certifications (some cases)	7/2/2025			Srinivas	
2 IR	Н	MUNIS BPP/BPOL account	Some accounts not available in New system [missing accts	7/2/2025			Srinivas	
-	migrations		population for account migration]	7, 2, 2023			51	
3 IR	Н		For New business licenses, BPP account profile is	7/2/2025			Srinivas	
		, , , , , , , , , , , , , , , , , , , ,	automatically created; (occassionally created duplicate)	., _,				
4 IR	Н	PDF not opening - BPOL/BPP	Filing and Invoices not opening and is sporadic	7/2/2025			Srinivas	
			[ Go over and see historical requests & trend to identify the	., _,				
			pattern					
5 IR	Н	Request for incorrect payment	Gap in New business license application process to limit	7/2/2025			Srinivas	
		corrections for	creation of new license associated with an account.					
		new licenses created { This is	How about new account ? With new license ?					
		tied to various areas as	No process defined for activating a licenses when it is					
		duplicate license types have	inactive? What is the process for opening business ? (Require					
		been created	discusion to go over all the requirments associated)					
6 IR	Н	BPP Account not available	Previously discussed { Data refreshes are not being scheduled	7/2/2025			Srinivas	
			daily}					
<b>7</b> IR	Н	Penalty & Interest BPOL	Requires broader discussion; Issues: 1. Traning issue 2. Some	7/2/2025			Srinivas	
		Tax amount is set to empty for	account/licenses have penalty/interest added due to tax					
		renewals for some cases	amount set as 0 { Bug}					
8 IR	Н	Renewal license (Not able to	Exempt vs non-exempt status { Training issue}; Adding a	7/2/2025			Srinivas	
		enter amount)	license status in customer search   Finance team to go over					
			pain points					
SR TRACKING:								
<b>1</b> SR	Н	Address Updates- BPP	No funcitonality available for BPP address updates	7/2/2025			Srinivas	
<b>2</b> SR	Н	Adress updates - BPOL	Finance team to come up with a process and give	7/2/2025			Srinivas	
		(Renewal License)	requirement to technical team ( This issue is raised as					
			concern for allowing location updates by themselves in					
			customer portal without paper work or approval proesses)					
			Restrictions and functionality definition					
<b>3</b> SR	Н	NEW BPP Account profile	No functionality exists for creation of new BPP profile	7/2/2025			Srinivas	
			[Current process is setup account in MUNIS move to RVAPAY]					
<b>4</b> SR	Н	EIN Updates for BPP, BPOL	No functionality to update EIN's forBPOL or BPP; Business	7/2/2025			Srinivas	
			descisions needed on how; Having customer submit requests					
			from portal or only finance doing?					
			Already registred customer - Corrections should happen at					
			registration level; Also tracing history of changes across any					
			profile updates; Incorrect in MUNIS and same in new system					
<b>5</b> SR	Н	Transfers - BPP	Funcitonality is not available yet and in pipeline	7/2/2025			Srinivas	
<b>6</b> SR	Н	Transfers - BPOL	Funcitonality is not available yet and in pipeline	7/2/2025			Srinivas	

# OUR CORE VALUES:

## **PROFESSIONAL**

We exhibit a courteous, conscientious, and businesslike manner in the workplace.

## **ACCOUNTABLE**

Our work is knowable, doable, and explainable; we answer for it.

## COMPETENT

This staff possesses the requisite abilities to get things done correctly and on schedule.

## **TEAM**

Together we are marked by devotion to teamwork rather than individual achievement.





## A performance evaluation document was provided for use to tie employee performance to the P A C T cultural values and expectations for performance. Specific performance standards are identified to describe desired behaviors.

#### EMPLOYEE PERFORMANCE EVALUATION & PLANNING FORM

		Evaluation Period:   FY2025
Employee's Nar	ne: Employee ID:	Evaluation Date:
Position Title:	Department:	Division/Unit:
	Performance Planning at the start of the Fiscal Year a sluation is to be performed providing a rating and con	and the Final Performance Evaluation at the $conclusion$ of the Fiscal Year, aments for each evaluation factor.
	Planning, the Supervisor shall:	
		lues and Competencies. The <u>sum of the section equaling 50%</u> .
	ist two (2) SMART GOALS, with up to two (2) options	
	weight between 5% to 25% for each of the SMART GO Il weights must equal 100%.	ALS with the sum of that section equaling 50%.
The sum of a	ii weights <u>must equal 100%</u> .	
his form shall:		
Be signed by	the supervisor.	
	the employee.	
	to the employee.	
	the Division Head for review and signature.	
<ul> <li>Forwarded to</li> </ul>	Human Resources for file reference.	
Rate the employee Outstanding		hoosing the appropriate level for each factor using the following sca
Outstanding		nner during this evaluation period with accomplishments well beyond the visor's expectations. Stood out among peers and made critical
	contributions to the team.	visor's expectations. Stood out among peers and made critical
Exceeds		during this evaluation period. Did more than expected by the supervisor.
Expectations	Contributed significantly to the team.	
Meets Expectations	positive contribution to the team.	during this evaluation period. Fulfilled supervisor's expectations. Made a
Below Expectations		ia during this evaluation period. Did not work up to the supervisor's n; Performance Improvement Plan (PIP) will be started to correct

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A mir up t	RT GOALS FOR THE EVALUATION PERIOD nimum of Two (2) SMART GOALS are Required, to Four (4) may be included - Must include the Description and Due Date for Completion on of Weights for the SMART GOALS section must qual softs."	Weight (5% to 25) (Totaling 50%)	Rating (1 to 4)	Score (Weight x Rating)	Comments
5-	SMART GOAL 1 (required):				Comments
	Due Date: Click here to enter text.				
6.	SMART GOAL 2 (required):				Comments
	Due Date: Click here to enter text.				
7-	SMART GOAL 3 (optional):				Comments
	Due Date: Click here to enter text.				
8.	SMART GOAL 4 (optional):				Comments
	Due Date: Click here to enter text.				
	TOTAL of SMART GOALS:	50			
TOI	AL OF BOTH SECTIONS ADDED TOGETHER:				

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For	DIVISION VALUES AND COMPETENCIES r specific examples see Performance Evaluation Values & Competencies section below n of Weights for the VALUES AND COMPETENCIES section must equal 50%**	Weight (5% to 10%) Totaling 50%	Rating (1 to 4)	Score (Weight x Rating)	Comments
L	Professional: Demonstrates respect in actions and words to team members and customers providing outstanding and courteous service.				Comments?
2.	Accountable: Executes assignments in a timely, satisfactory and responsible manner with consideration of the needs of the team and customers.				Comments?
3.	Competent: Exhibits an understanding and knowledge of the profession and meets performance standards complying with policies and procedures.				Comments?
4-	Team Spirit: Demonstrates support for the organizational goals and a positive disposition in all interactions.				Comments?
TOTAL of VALUES & COMPETENCIES SECTION:		50			

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Develop at le					DMING FISCAL YEAR als that support career/individual development through	
		impr	oved knowledge, sk	ills, and abil	ities.	
1.						
2.						
3-						
			DRMANCE PLANN			
REQUIRED SIG		discussion was hel	d to establish expe	ctations, d	efine SMART GOALS, and specify weighting.	
	ance Planning Discus	sion: Click here to ent	er text.			
Employee:	Employee:					
Direct Superviso	Direct Supervisor or Manager:					
Manager or Divi	Manager or Division Head:					
		ovi	ERALL RATING FO	R PERFOR	MANCE EVALUATION	
Check box	Enter Total score					
		Outstanding – Score total of 360-400				
	Exceeds Expectati	ons - Score total of	260-359			
	Meets Expectations - Score total of 160-259					
Below Expectations - Score total below 160						

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	SUPERVISOR COMMEN	VTS					
EMPLOYEE COMMENTS							
REQUIRED SIGNATURES:		Important Notes Employee's signature indicates their participation in the process. Employee's comments may be submitted as attachments.					
Employee:	Date:						
Supervisor:	Date:						
Department Head:	Date:						
	1						

#### PERFORMANCE EVALUATION

Professional	Accountable	Competent	Team Spirit
Demonstrates respect in actions and words to team members and customers providing outstanding and courteous service.	Executes assignments in a timely, satisfactory and responsible manner with consideration of the needs of the team and customers.	Exhibits an understanding and knowledge of profession and meets performance standards complying with policies and procedures.	Demonstrates support for the organizational goals and a positive disposition in all interactions.
Models ethical and houses behavior consistent with the engonizational values guiding principles. Byresenst the organization in a parties and professional insurance. Byresenst the organization in a pastive and professional insurance. As a superposition of the professional insurance of the professional insu	Does the right things well: consistent of deliver quality results on time and within budget.  Takes ownership and responsibility for individual and been peak.  Takes ownership and responsibility for individual and been peak of the result of the peak of the results of the peak of the results of the peak of the results in provenants and echieve results. Honors work commitment and deadless organizing and prioritizing work and assist place and results work and assist place and results of the results	Winds to improve job tourholge. Seeks opportunities to learn new skills/sequire knowledge for professional growth. Demonstrates understanding of job tourners and productional resiston, code, and velues. Mosts desillines and communicates actuals in advance of needed adjustments. Execute assignments to meet (exceed adjustments, etc. in an efficient and effective manner. Follow all sefects manner. Follow all sefects promise to a self-working and stendard operating procedures workplace. Embraces being reactions have ways of doing the job to improve cutements services, processes, and overall efficiences and efficiency the job with famile different sources.	Develops and resistating spessive working relationships, even in difficult situations.  Communicates and works effectively with coworkers and as part of a team deadline.  Constructively resolves conflicts that raise.  Actively abarus information/knowledge with others as appropriate.  Actively abarus information/knowledge with others as appropriate.  Shaves recognition and credit with others.  Shaves recognition and credit with others.  Supports the team diversion without undermining or promoting negativity. Lindenships of the conflict o

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