

Agency Budget Request

FISCAL YEAR 2025–2026



Executive Department

106 — Louisiana Tax Commission



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Signature Page

BUDGET REQUEST

Fiscal Year Ending June 30, 2026



NAME OF DEPARTMENT / AGENCY: LOUISIANA TAX COMMISSION PHYSICAL ADDRESS: 1051, NORTH 3RD ST.,
BATON ROUGE, LA

BUDGET UNIT: 106

SCHEDULE NUMBER: 01 ZIP CODE: 70802

TELEPHONE NUMBER: 225 219 0339 WEB ADDRESS: WWW.LATAX.STATE.LA.US

WE HEREBY CERTIFY THAT THE STATEMENTS AND FIGURES ON THE ACCOMPANYING FORMS ARE TRUE AND CORRECT TO THE BEST OF OUR KNOWLEDGE.

HEAD OF DEPARTMENT: <u></u> PRINTED NAME/TITLE: <u>MICHAEL MATHERNE, ADMINISTRATOR</u> DATE: <u>10/18/2024</u> EMAIL ADDRESS: <u>MICHAEL.MATHERNE@LA.GOV</u>	HEAD OF BUDGET UNIT: <u></u> PRINTED NAME/TITLE: <u>MICHAEL MATHERNE, ADMINISTRATOR</u> DATE: <u>10/18/2024</u> EMAIL ADDRESS: <u>MICHAEL.MATHERNE@LA.GOV</u>
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PROGRAM CONTACT PERSON: <u>RAJESH JAIN</u> TITLE: <u>DIRECTOR OF ADMIN.</u> TELEPHONE NUMBER: <u>225 219 0339</u> EMAIL ADDRESS: <u>RAJESH.JAIN@LA.GOV</u>	FINANCIAL CONTACT PERSON: <u>RAJESH JAIN</u> TITLE: <u>DIRECTOR OF ADMIN</u> TELEPHONE NUMBER: <u>225 219 0339</u> EMAIL ADDRESS: <u>RAJESH.JAIN@LA.GOV</u>
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Operational Plan

STATE OF LOUISIANA
Operational Plan Form
Department Goals

DEPARTMENT NUMBER AND NAME: LTC - LTC

DEPARTMENT MISSION:

The Louisiana Tax Commission will serve Louisiana taxpayers fairly and with integrity by administering property tax laws. The agency reviews and certifies the various parish assessment rolls and acts as an appellate body for appeals by assessors, taxpayers, and tax recipient bodies after actions by parish review boards; provides guidelines for assessment of movable property and performs and reviews appraisals or assessments and where necessary modifies (or orders reassessment) to ensure uniformity and fairness. Assesses all public service property, as well as valuation of banks and insurance companies, and provides assistance to assessors.

DEPARTMENT GOALS:

- To provide the general public with a centralized place to obtain property tax information.
- To provide confidence to the taxpayers in the state that their assessments are fair and equitable.

STATE OF LOUISIANA
Operational Plan Form
Agency Goals

AGENCY NUMBER AND NAME: 106 - Louisiana Tax Commission

AGENCY MISSION:

The Louisiana Tax Commission will serve Louisiana taxpayers fairly and with integrity by administering property tax laws. The agency reviews and certifies the various parish assessment rolls, and acts as an appellate body for appeals by assessors, taxpayers, and tax recipient bodies after actions by parish review boards; provides guidelines for assessment of movable property and performs and reviews appraisals or assessments and where necessary modifies (or orders reassessment) to ensure uniformity and fairness. Assesses all public service property, as well as valuation of banks and insurance companies, and provides assistance to assessors.

AGENCY GOALS:

- To provide the general public with a centralized place to obtain property tax information.
- To provide confidence to the taxpayers in the state that their assessments are fair and equitable.

STATEMENT OF AGENCY STRATEGY FOR DEVELOPMENT OF HUMAN RESOURCE POLICIES THAT ARE HELPFUL AND BENEFICIAL TO WOMEN AND FAMILIES:

STATE OF LOUISIANA
Operational Plan Form
Program Goals

PROGRAM NUMBER AND NAME: 1061 - Property Taxation Regulatory/Oversight

PROGRAM AUTHORIZATION:

R.S. 1831-1837 & HB ACT 19-1998

PROGRAM MISSION:

The Louisiana Tax Commission will serve Louisiana taxpayers fairly and with integrity by administering property tax laws. The agency reviews and certifies the various parish assessment rolls and acts as an appellate body for appeals by assessors, taxpayers, and tax recipient bodies after actions by parish review boards; provides guidelines for assessment of movable property and performs and reviews appraisals or assessments and where necessary modifies (or orders reassessment) to ensure uniformity and fairness. Assesses all public service property, as well as valuation of banks and insurance companies, and provides assistance to assessors.

PROGRAM GOALS:

PROGRAM A: PROPERTY TAXATION REGULATORY/OVERSIGHT

The Property Taxation Regulatory/Oversight Program is responsible for the administrative activities of the Commission, thereby, managing the fiscal and business affairs of the Commission to assure compliance with all statutes relative to the duties and responsibilities of the Commission.

Through the Property Taxation Regulatory/Oversight Program, the Commission conducts public hearings concerning appeals from taxpayers or assessors. The Commission also determines the tax assessment of all public service properties, insurance companies, and banks. Ratio studies are completed in all 64 parishes on an annual basis to ensure uniformity of tax assessments. Random audits are conducted on personal and public service properties throughout the year by the audit staff.

Through the review of assessments, the Commission will certify the assessment rolls and process all change orders submitted by the local assessors.

PROGRAM B: SUPERVISION AND ASSISTANCE TO LOCAL ASSESSORS

This program is being combined with Program A: PROPERTY TAXATION REGULATORY/OVERSIGHT, Administrative, Banks, and Insurance Assessments, and Hearing activity where the funds for this program are managed and the functions of this program are performed. The mission and goals below are combined in the Administrative, Banks and Insurance Assessments, and Hearing activity above.

The mission of this activity is to act in an oversight capacity, assisting the assessors and providing instructions as required by Louisiana law and to ensure that all assessment rolls are submitted in the approved format for inclusion in the LTC website.

GOAL:

- To ensure that all property in Louisiana is assessed fair and equitable and placed in the property assessment roll to be included on the LTC website.
- To post all parish proposed assessment lists on the LTC website as required by ACT 310 of the 2005 Regular Legislative Session.

PROGRAM ACTIVITY:

STATE OF LOUISIANA

Operational Plan Form

Program Goals

PROGRAM NUMBER AND NAME: 1061 - Property Taxation Regulatory/Oversight

ADMINISTRATIVE, BANKS AND INSURANCE ASSESSMENTS, AND PUBLIC HEARINGS

This activity's mission is to manage the fiscal and business affairs of the Louisiana Tax Commission (LTC), to work with the Louisiana Assessors Association to provide leadership and guidance to all state assessors; to render assessments on all financial institutions, and insurance companies in the State of Louisiana according to Louisiana tax laws; to hold all appeal hearings timely; and to act in an oversight capacity, assisting the assessors and providing instructions as required by Louisiana law and to ensure that all assessment rolls are submitted in the approved format for inclusion on the LTC website.

- To assure compliance with all statutes relative to the duties and responsibilities of the LTC R.S. 47:1837.
- To improve the image of the LTC. To promote the highest degree of voluntary compliance.
- To assess all property and casualty insurance companies and state-chartered stock financial institutions annually and certify these numbers to assessors by September 1.
- To ensure that all property in Louisiana is assessed fair and equitable and placed on the property assessment roll to be included on the LTC website.
- To post all parish proposed and certified assessment lists on the LTC website as required by Act. 310 of the 2005 Regular Session of the Louisiana Legislature.

PUBLIC SERVICE AND AUDIT

This activity's mission is to fairly and uniformly appraise and certify assessments of all public utility property and continue to provide a comprehensive audit program for all personal and public service property in the state.

- To correctly apply Louisiana laws in the determination of fair market value of public service properties and certify these public utility assessments annually to each parish assessor by September 1.
- To make available all public utility forms on the internet.
- To conduct in-depth audits of personal property and public utility companies as required or as requested by parish assessors.
- To maintain a professional staff through education and training and to improve employee productivity through the use of updated technology.

APPRAISAL

This activity's mission is to ensure accurate and uniform assessments of all real property in the state.

- To use oversight authority to ensure accurate and uniform administration of real property taxation by local parish assessors.
- To maintain a professional staff through education and training and to improve employee productivity through the use of updated technology.
- To become increasingly efficient with respect to information used in the appraisal process.

STATE OF LOUISIANA
Operational Plan Form
Activities/Objectives - Performance Indicators

DEPARTMENT ID: 01 - EXEC

AGENCY ID: 106 - Louisiana Tax Commission

PROGRAM ID: 1061 - Property Taxation Regulatory/Oversight

PM OBJECTIVE: 1061-01 - To hear 100% of all protest hearings within the tax year in which the protest was filed; to calculate all bank and insurance company assessments for inclusion on the various parish tax rolls which is necessary to support the local assessors in providing the means for local government to receive the tax dollars to operate, and to implement the electronic filing of tax documents that parish assessors must file with the LTC by establishing electronic links between the Commission and at least the parish assessors and certify the local tax rolls.

Children's Budget Link:

Human Resource Policies Beneficial to Women and Families Link:

Other Links (TANF, Tobacco Settlement, Workforce Development Commission, or Other):

Explanatory Notes:

Performance Indicator	Level	Performance Indicator Name	Unit	Performance Indicator Values						
				Year End Performance Standard 2023 - 2024	Actual Year End Performance 2023 - 2024	Performance Standard as Initially Appropriated 2024 - 2025	Existing Performance Standard 2024 - 2025	Performance at Continuation Budget Level 2025 - 2026	Performance at Executive Budget Level 2025 - 2026	Performance Standard as Initially Appropriated 2025 - 2026
10480	K	Percentage of tax rolls certified before November 15th of each year	P	100	97	100	100	100	0	0
3578	K	Percentage of protest hearings completed within the tax year in which the protest was filed	P	50	47	50	50	50	0	0
3583	K	Percentage of banks and insurance companies assessed	P	100	100	100	100	100	0	0
3609	K	Number of assessors filing tax rolls electronically	N	64	64	64	64	64	0	0
3610	K	Number of assessors filing change orders electronically	N	64	64	64	64	64	0	0

STATE OF LOUISIANA
Operational Plan Form
Activities/Objectives - Performance Indicators

DEPARTMENT ID: 01 - EXEC

AGENCY ID: 106 - Louisiana Tax Commission

PROGRAM ID: 1061 - Property Taxation Regulatory/Oversight

Performance Indicator	Level	Performance Indicator Name	Unit	General Performance Information				
				Performance Indicator Values				
				Prior Year Actual FY2019 - 2020	Prior Year Actual FY2020 - 2021	Prior Year Actual FY2021 - 2022	Prior Year Actual FY2022 - 2023	Prior Year Actual FY2023 - 2024
26309	G	Number of protest hearings completed within the tax year in which the protest was filed	N	466	557	780	652	305
3579	G	Total number of protest hearings completed	N	327	2,464	131	905	648
3586	G	Number of banks assessed	N	114	113	114	113	111
3587	G	Assessed value of banks (in \$ millions)	D	765.3	746.8	1,026	1,014	1,019
3588	G	Number of insurance companies assessed	N	821	850	841	829	842
3589	G	Assessed value of insurance companies (in \$ millions)	D	135.2	135	141.7	149.1	166
3606	G	Number of tax rolls certified	N	64	64	64	64	64
3607	G	Number of change orders processed/reviewed	N	172,772	150,808	38,186	37,144	64,550

STATE OF LOUISIANA
Operational Plan Form
Activities/Objectives - Performance Indicators

DEPARTMENT ID: 01 - EXEC

AGENCY ID: 106 - Louisiana Tax Commission

PROGRAM ID: 1061 - Property Taxation Regulatory/Oversight

PM OBJECTIVE: 1061-02 - To audit personal property requests made by assessors throughout the state and conduct any related industry audits and to perform public utility company appraisals and arrive at assessments for inclusion on the various parish tax rolls (e.g. necessary activities to support the local assessor in providing the means for local government to receive the tax dollars necessary to operate).

Children's Budget Link:

Human Resource Policies Beneficial to Women and Families Link:

Other Links (TANF, Tobacco Settlement, Workforce Development Commission, or Other):

Explanatory Notes:

Performance Indicator	Level	Performance Indicator Name	Unit	Performance Indicator Values						
				Year End Performance Standard 2023 - 2024	Actual Year End Performance 2023 - 2024	Performance Standard as Initially Appropriated 2024 - 2025	Existing Performance Standard 2024 - 2025	Performance at Continuation Budget Level 2025 - 2026	Performance at Executive Budget Level 2025 - 2026	Performance Standard as Initially Appropriated 2025 - 2026
3597	K	Percentage of public utility companies appraised and assessed	P	100	100	100	100	100	0	0
3604	S	Number of personal property audits conducted	N	0	0	5	5	5	0	0

Performance Indicator	Level	Performance Indicator Name	Unit	General Performance Information				
				Performance Indicator Values				
				Prior Year Actual FY2019 - 2020	Prior Year Actual FY2020 - 2021	Prior Year Actual FY2021 - 2022	Prior Year Actual FY2022 - 2023	Prior Year Actual FY2023 - 2024
13769	G	Assessed value added to parish tax rolls (in \$ millions)	D	314	311	124	294	263.4
3598	G	Number of public service appraisals conducted	N	752	775	758	746	682
3599	G	Assessed value of public service properties (in \$ billions)	D	6,317	6,626	6,750	7,045	7,308
3600	G	Ad valorem taxes produced by public service properties (in \$ millions)	D	703.1	729.5	729.1	786	742.5
3601	G	Number of public service audits conducted	N	13	6	8	6	4
3602	G	Additional taxes realized by local government as a result of public service audits	D	13,298	0	0	186,831	0

STATE OF LOUISIANA
Operational Plan Form
Activities/Objectives - Performance Indicators

DEPARTMENT ID: 01 - EXEC

AGENCY ID: 106 - Louisiana Tax Commission

PROGRAM ID: 1061 - Property Taxation Regulatory/Oversight

PM OBJECTIVE: 1061-03 - To conduct appraisals throughout the state to assist local assessors.

Children's Budget Link:

Human Resource Policies Beneficial to Women and Families Link:

Other Links (TANF, Tobacco Settlement, Workforce Development Commission, or Other):

Explanatory Notes:

Performance Indicator	Level	Performance Indicator Name	Unit	Performance Indicator Values						
				Year End Performance Standard 2023 - 2024	Actual Year End Performance 2023 - 2024	Performance Standard as Initially Appropriated 2024 - 2025	Existing Performance Standard 2024 - 2025	Performance at Continuation Budget Level 2025 - 2026	Performance at Executive Budget Level 2025 - 2026	Performance Standard as Initially Appropriated 2025 - 2026
3590	S	Number of ratio studies conducted	N	64	0	64	64	0	0	0
3593	K	Total number of property appraisals conducted	N	6,500	3,473	6,500	6,500	6,500	0	0



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Budget Request Overview

AGENCY SUMMARY STATEMENT

Total Agency

Means of Financing

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
STATE GENERAL FUND (Direct)	1,968,912	2,058,414	2,144,321	85,907	4.17%
STATE GENERAL FUND BY:	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—
FEES & SELF-GENERATED	3,220,147	3,387,438	3,368,178	(19,260)	(0.57)%
STATUTORY DEDICATIONS	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,189,059	\$5,445,852	\$5,512,499	\$66,647	1.22%

Fees and Self-Generated

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
Tax Commission Expense Dedicated Fund Account	3,220,147	3,387,438	3,368,178	(19,260)	(0.57)%
Total:	\$3,220,147	\$3,387,438	\$3,368,178	\$(19,260)	(0.57)%

Statutory Dedications

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
Total:	—	—	—	—	—

Agency Expenditures

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
Salaries	2,514,476	2,616,861	2,717,284	100,423	3.84%
Other Compensation	15,976	50,000	50,000	—	—
Related Benefits	1,568,615	1,526,916	1,479,982	(46,934)	(3.07)%
TOTAL PERSONAL SERVICES	\$4,099,066	\$4,193,777	\$4,247,266	\$53,489	1.28%
Travel	168,258	160,000	163,583	3,583	2.24%
Operating Services	90,537	92,431	94,501	2,070	2.24%
Supplies	18,772	20,000	20,448	448	2.24%
TOTAL OPERATING EXPENSES	\$277,567	\$272,431	\$278,532	\$6,101	2.24%
PROFESSIONAL SERVICES	\$207,625	\$315,000	\$322,057	\$7,057	2.24%
Other Charges	—	50,000	50,000	—	—
Debt Service	—	—	—	—	—
Interagency Transfers	586,682	614,644	614,644	—	—
TOTAL OTHER CHARGES	\$586,682	\$664,644	\$664,644	—	—
Acquisitions	18,118	—	—	—	—
Major Repairs	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	\$18,118	—	—	—	—
TOTAL EXPENDITURES	\$5,189,059	\$5,445,852	\$5,512,499	\$66,647	1.22%

Agency Positions

Classified	30	30	30	—	—
Unclassified	6	6	6	—	—
TOTAL AUTHORIZED T.O. POSITIONS	36	36	36	—	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	1	1	—	—
TOTAL POSITIONS	37	37	37	—	—

Cost Detail

Means of Financing

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
State General Fund	1,968,912	2,058,414	2,144,321	85,907
Tax Commission Expense Dedicated Fund Account	3,220,147	3,387,438	3,368,178	(19,260)
Total:	\$5,189,059	\$5,445,852	\$5,512,499	\$66,647

Salaries

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5110010	SAL-CLASS-TO-REG	2,099,517	2,163,561	2,263,984	100,423
5110025	SAL-UNCLASS-TO-REG	414,959	453,300	453,300	—
Total Salaries:		\$2,514,476	\$2,616,861	\$2,717,284	\$100,423

Other Compensation

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5120010	COMPENSATION/WAGES	15,976	50,000	50,000	—
Total Other Compensation:		\$15,976	\$50,000	\$50,000	—

Related Benefits

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5130010	RET CONTR-STATE EMP	962,474	833,048	845,256	12,208
5130020	RET CONTR-TEACHERS	30,287	34,986	30,114	(4,872)
5130050	POSTRET BENEFITS	233,852	233,507	233,507	—
5130055	FICA TAX (OASDI)	991	2,669	2,669	—
5130060	MEDICARE TAX	32,592	32,548	39,406	6,858
5130070	GRP INS CONTRIBUTION	288,593	370,519	308,924	(61,595)
5130090	TAXABLE FRINGE BEN	19,826	19,639	20,106	467
Total Related Benefits:		\$1,568,615	\$1,526,916	\$1,479,982	\$(46,934)

Travel

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5210010	IN-STATE TRAVEL-ADM	9,062	1,791	1,831	40
5210015	IN-STATE TRAVEL-CONF	7,359	1,531	1,565	34
5210020	IN-STATE TRAV-FIELD	112,660	82,790	84,644	1,854
5210025	IN-STATE TRV-BD MEM	16,841	24,396	24,943	547
5210030	IN-STATE TRV-IT/TRN	—	306	313	7
5210050	OUT-OF-STATE TRV-ADM	1,529	—	—	—
5210055	OUT-OF-STTRV-CONF	4,454	—	—	—
5210060	OUT-OF-STTRV-FIELD	16,353	49,186	50,287	1,101
Total Travel:		\$168,258	\$160,000	\$163,583	\$3,583

Operating Services

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5310005	SERV-PRINTING	311	588	601	13
5310010	SERV-DUES & OTHER	38,650	35,447	36,241	794
5310400	SERV-MISC	4,606	16,888	17,266	378
5330017	MAINT-DATA SOFTWARE	2,475	3,468	3,546	78
5340020	RENT-EQUIPMENT	11,349	10,918	11,163	245
5350001	UTIL-INTERNET PROVID	23,046	3,591	3,671	80
5350006	UTIL-MAIL/DEL/POST	10,086	21,531	22,013	482
5350011	UTIL-WATER	14	—	—	—
Total Operating Services:		\$90,537	\$92,431	\$94,501	\$2,070

Supplies

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5410001	SUP-OFFICE SUPPLIES	13,977	12,196	12,469	273

Supplies *(continued)*

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5410006	SUP-COMPUTER	4,534	6,764	6,916	152
5410007	SUP-CLOTHING/UNIFORM	261	1,040	1,063	23
Total Supplies:		\$18,772	\$20,000	\$20,448	\$448

Professional Services

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5510005	PROF SERV-LEGAL	207,625	315,000	322,057	7,057
Total Professional Services:		\$207,625	\$315,000	\$322,057	\$7,057

Other Charges

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5620064	MISC-PROF SVCS	—	50,000	50,000	—
Total Other Charges:		—	\$50,000	\$50,000	—

Interagency Transfers

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5950001	IAT-COMMODITY/SERV	93,608	165,806	165,806	—
5950007	IAT-PRINTING	21,157	20,727	20,727	—
5950008	IAT-POSTAGE	1,200	1,897	1,897	—
5950014	IAT-TELEPHONE	19,881	39,142	39,142	—
5950017	IAT-INSURANCE	32,855	32,855	32,855	—
5950026	IAT-RENTALS	72,198	72,198	72,198	—
5950034	IAT-OFFICE SUPPLIES	—	3,570	3,570	—
5950038	IAT-OTHER OPER SERV	230	—	—	—

Interagency Transfers *(continued)*

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5950058	IAT-TECH SVCS	338,305	278,449	278,449	—
5950059	IAT-ST PROCUREMENT	7,247	—	—	—
Total Interagency Transfers:		\$586,682	\$614,644	\$614,644	—

Acquisitions

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5710950	TRANS-VEHICLES-MA	18,118	—	—	—
Total Acquisitions:		\$18,118	—	—	—
Total Agency Expenditures:		\$5,189,059	\$5,445,852	\$5,512,499	\$66,647

PROGRAM SUMMARY STATEMENT

1061 - Property Taxation Regulatory/Oversight

Means of Financing

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
STATE GENERAL FUND (Direct)	1,968,912	2,058,414	2,144,321	85,907	4.17%
STATE GENERAL FUND BY:	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—
FEES & SELF-GENERATED	3,220,147	3,387,438	3,368,178	(19,260)	(0.57)%
STATUTORY DEDICATIONS	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,189,059	\$5,445,852	\$5,512,499	\$66,647	1.22%

Fees and Self-Generated

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
Tax Commission Expense Dedicated Fund Account	3,220,147	3,387,438	3,368,178	(19,260)	(0.57)%
Total:	\$3,220,147	\$3,387,438	\$3,368,178	\$(19,260)	(0.57)%

Program Expenditures

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Percent Change
Salaries	2,514,476	2,616,861	2,717,284	100,423	3.84%
Other Compensation	15,976	50,000	50,000	—	—
Related Benefits	1,568,615	1,526,916	1,479,982	(46,934)	(3.07)%
TOTAL PERSONAL SERVICES	\$4,099,066	\$4,193,777	\$4,247,266	\$53,489	1.28%
Travel	168,258	160,000	163,583	3,583	2.24%
Operating Services	90,537	92,431	94,501	2,070	2.24%
Supplies	18,772	20,000	20,448	448	2.24%
TOTAL OPERATING EXPENSES	\$277,567	\$272,431	\$278,532	\$6,101	2.24%
PROFESSIONAL SERVICES	\$207,625	\$315,000	\$322,057	\$7,057	2.24%
Other Charges	—	50,000	50,000	—	—
Debt Service	—	—	—	—	—
Interagency Transfers	586,682	614,644	614,644	—	—
TOTAL OTHER CHARGES	\$586,682	\$664,644	\$664,644	—	—
Acquisitions	18,118	—	—	—	—
Major Repairs	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	\$18,118	—	—	—	—
TOTAL EXPENDITURES	\$5,189,059	\$5,445,852	\$5,512,499	\$66,647	1.22%

Program Positions

Classified	30	30	30	—	—
Unclassified	6	6	6	—	—
TOTAL AUTHORIZED T.O. POSITIONS	36	36	36	—	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	1	1	—	—
TOTAL POSITIONS	37	37	37	—	—

Cost Detail

Means of Financing

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
State General Fund	1,968,912	2,058,414	2,144,321	85,907
Tax Commission Expense Dedicated Fund Account	3,220,147	3,387,438	3,368,178	(19,260)
Total:	\$5,189,059	\$5,445,852	\$5,512,499	\$66,647

Salaries

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5110010	SAL-CLASS-TO-REG	2,099,517	2,163,561	2,263,984	100,423
5110025	SAL-UNCLASS-TO-REG	414,959	453,300	453,300	—
Total Salaries:		\$2,514,476	\$2,616,861	\$2,717,284	\$100,423

Other Compensation

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5120010	COMPENSATION/WAGES	15,976	50,000	50,000	—
Total Other Compensation:		\$15,976	\$50,000	\$50,000	—

Related Benefits

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5130010	RET CONTR-STATE EMP	962,474	833,048	845,256	12,208
5130020	RET CONTR-TEACHERS	30,287	34,986	30,114	(4,872)
5130050	POSTRET BENEFITS	233,852	233,507	233,507	—
5130055	FICA TAX (OASDI)	991	2,669	2,669	—
5130060	MEDICARE TAX	32,592	32,548	39,406	6,858
5130070	GRP INS CONTRIBUTION	288,593	370,519	308,924	(61,595)
5130090	TAXABLE FRINGE BEN	19,826	19,639	20,106	467
Total Related Benefits:		\$1,568,615	\$1,526,916	\$1,479,982	\$(46,934)

Travel

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5210010	IN-STATE TRAVEL-ADM	9,062	1,791	1,831	40
5210015	IN-STATE TRAVEL-CONF	7,359	1,531	1,565	34
5210020	IN-STATE TRAV-FIELD	112,660	82,790	84,644	1,854
5210025	IN-STATE TRV-BD MEM	16,841	24,396	24,943	547
5210030	IN-STATE TRV-IT/TRN	—	306	313	7
5210050	OUT-OF-STATE TRV-ADM	1,529	—	—	—
5210055	OUT-OF-STTRV-CONF	4,454	—	—	—
5210060	OUT-OF-STTRV-FIELD	16,353	49,186	50,287	1,101
Total Travel:		\$168,258	\$160,000	\$163,583	\$3,583

Operating Services

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5310005	SERV-PRINTING	311	588	601	13
5310010	SERV-DUES & OTHER	38,650	35,447	36,241	794
5310400	SERV-MISC	4,606	16,888	17,266	378
5330017	MAINT-DATA SOFTWARE	2,475	3,468	3,546	78
5340020	RENT-EQUIPMENT	11,349	10,918	11,163	245
5350001	UTIL-INTERNET PROVID	23,046	3,591	3,671	80
5350006	UTIL-MAIL/DEL/POST	10,086	21,531	22,013	482
5350011	UTIL-WATER	14	—	—	—
Total Operating Services:		\$90,537	\$92,431	\$94,501	\$2,070

Supplies

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5410001	SUP-OFFICE SUPPLIES	13,977	12,196	12,469	273

Supplies *(continued)*

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5410006	SUP-COMPUTER	4,534	6,764	6,916	152
5410007	SUP-CLOTHING/UNIFORM	261	1,040	1,063	23
Total Supplies:		\$18,772	\$20,000	\$20,448	\$448

Professional Services

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5510005	PROF SERV-LEGAL	207,625	315,000	322,057	7,057
Total Professional Services:		\$207,625	\$315,000	\$322,057	\$7,057

Other Charges

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5620064	MISC-PROF SVCS	—	50,000	50,000	—
Total Other Charges:		—	\$50,000	\$50,000	—

Interagency Transfers

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5950001	IAT-COMMODITY/SERV	93,608	165,806	165,806	—
5950007	IAT-PRINTING	21,157	20,727	20,727	—
5950008	IAT-POSTAGE	1,200	1,897	1,897	—
5950014	IAT-TELEPHONE	19,881	39,142	39,142	—
5950017	IAT-INSURANCE	32,855	32,855	32,855	—
5950026	IAT-RENTALS	72,198	72,198	72,198	—
5950034	IAT-OFFICE SUPPLIES	—	3,570	3,570	—
5950038	IAT-OTHER OPER SERV	230	—	—	—

Interagency Transfers *(continued)*

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5950058	IAT-TECH SVCS	338,305	278,449	278,449	—
5950059	IAT-ST PROCUREMENT	7,247	—	—	—
Total Interagency Transfers:		\$586,682	\$614,644	\$614,644	—

Acquisitions

Commitment Item	Name	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB
5710950	TRANS-VEHICLES-MA	18,118	—	—	—
Total Acquisitions:		\$18,118	—	—	—
Total Expenditures for Program 1061		\$5,189,059	\$5,445,852	\$5,512,499	\$66,647
Total Agency Expenditures:		\$5,189,059	\$5,445,852	\$5,512,499	\$66,647

SOURCE OF FUNDING SUMMARY

Agency Overview

Fees & Self-generated

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Total Request	Over/Under EOB	Form ID
RV4-TAX COMM EXP	3,220,147	3,387,438	3,368,178	(19,260)	33483
Total Fees & Self-generated	\$3,220,147	\$3,387,438	\$3,368,178	\$(19,260)	
Total Sources of Funding:	\$3,220,147	\$3,387,438	\$3,368,178	\$(19,260)	

SOURCE OF FUNDING DETAIL

Fees & Self-generated

Form 33483 — 106-RV4

Expenditures	Existing Operating Budget as of 10/01/2024			FY2025-2026 Total Request			FY2026-2027 Projected		
	Means of Financing	In-Kind Match	Cash Match	Means of Financing	In-Kind Match	Cash Match	Means of Financing	In-Kind Match	Cash Match
Salaries	1,720,548	—	—	1,688,478	—	—	1,603,762	—	—
Other Compensation	50,000	—	—	50,000	—	—	50,000	—	—
Related Benefits	818,242	—	—	818,242	—	—	747,208	—	—
TOTAL PERSONAL SERVICES	\$2,588,790	—	—	\$2,556,720	—	—	\$2,400,970	—	—
Travel	144,500	—	—	147,735	—	—	147,927	—	—
Operating Services	92,431	—	—	94,501	—	—	94,621	—	—
Supplies	20,000	—	—	20,448	—	—	20,474	—	—
TOTAL OPERATING EXPENSES	\$256,931	—	—	\$262,684	—	—	\$263,022	—	—
PROFESSIONAL SERVICES	\$315,000	—	—	\$322,057	—	—	\$322,466	—	—
Other Charges	50,000	—	—	50,000	—	—	50,000	—	—
Debt Service	—	—	—	—	—	—	—	—	—
Interagency Transfers	176,717	—	—	176,717	—	—	159,995	—	—
TOTAL OTHER CHARGES	\$226,717	—	—	\$226,717	—	—	\$209,995	—	—
Acquisitions	—	—	—	—	—	—	—	—	—
Major Repairs	—	—	—	—	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—	—	—	—	—	—
TOTAL EXPENDITURES	\$3,387,438	—	—	\$3,368,178	—	—	\$3,196,453	—	—

Form 33483 — 106-RV4

Question	Narrative Response
State the purpose, source and legal citation.	Interest :R.S. 47:1838 Assessment Fee: R.S. 47:1838 and R.S. 47:1838 ET SEQ of ACT 184 (1993) ACT 551 (formerly HB 608) of 2016 Regular Session Public Service Audit Fee : R.S.47:1838 ET SEQ of ACT 184 (1993) Personal Property and Audit Fee : R.S.47:1838 ET SEQ of ACT 184 (1993)
Agency discretion or Federal requirement?	Expenses reflects agency (LOUISIANA TAX COMMISSION) discretion.
Describe any budgetary peculiarities.	No peculiarities. No budget constraints.
Is the Total Request amount for multiple years?	Total request amount is \$5,545,046 for FY 2023-2024. EOB is 5,440,859
Additional information or comments.	Yes, Any unexpended funds listed in EOB column or unexpected and/ or over collected statutory dedications will remain in Louisiana Tax Commission Expense Fund (R.S. 47:1838. Preliminary projected carry forward amount from EOB 2022-2023 to Requested Year 2023-2024 is \$2,113,869
Provide the amount of any indirect costs.	NA
Any indirect costs funded with other MOF?	NA
Objectives and indicators in the Operational Plan.	NA
Additional information or comments.	NA

EXPENDITURES BY MEANS OF FINANCING

Existing Operating Budget

Expenditures	Used as a Cash Match	Total Means of Financing By Expenditure	Total State General Fund	Fees & Self-generated Form ID 33483 RV4-TAX COMM EXP
Salaries	—	2,616,861	896,313	1,720,548
Other Compensation	—	50,000	—	50,000
Related Benefits	—	1,526,916	708,674	818,242
TOTAL PERSONAL SERVICES	—	\$4,193,777	\$1,604,987	\$2,588,790
Travel	—	160,000	15,500	144,500
Operating Services	—	92,431	—	92,431
Supplies	—	20,000	—	20,000
TOTAL OPERATING EXPENSES	—	\$272,431	\$15,500	\$256,931
PROFESSIONAL SERVICES	—	\$315,000	—	\$315,000
Other Charges	—	50,000	—	50,000
Debt Service	—	—	—	—
Interagency Transfers	—	614,644	437,927	176,717
TOTAL OTHER CHARGES	—	\$664,644	\$437,927	\$226,717
Acquisitions	—	—	—	—
Major Repairs	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—
TOTAL EXPENDITURES	—	\$5,445,852	\$2,058,414	\$3,387,438

Total Request

Expenditures	Used as a Cash Match	Total Means of Financing By Expenditure	Total State General Fund	Fees & Self-generated Form ID 33483 RV4-TAX COMM EXP
Salaries	—	2,717,284	1,028,806	1,688,478
Other Compensation	—	50,000	—	50,000
Related Benefits	—	1,479,982	661,740	818,242
TOTAL PERSONAL SERVICES	—	\$4,247,266	\$1,690,546	\$2,556,720
Travel	—	163,583	15,848	147,735
Operating Services	—	94,501	—	94,501
Supplies	—	20,448	—	20,448
TOTAL OPERATING EXPENSES	—	\$278,532	\$15,848	\$262,684
PROFESSIONAL SERVICES	—	\$322,057	—	\$322,057
Other Charges	—	50,000	—	50,000
Debt Service	—	—	—	—
Interagency Transfers	—	614,644	437,927	176,717
TOTAL OTHER CHARGES	—	\$664,644	\$437,927	\$226,717
Acquisitions	—	—	—	—
Major Repairs	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—
TOTAL EXPENDITURES	—	\$5,512,499	\$2,144,321	\$3,368,178

REVENUE COLLECTIONS/INCOME

Fees & Self-generated

RV4 - Tax Commission Expense Dedicated Fund Account

Source	Commitment Item	Commitment Item Name	FY2023-2024 Actuals	FY-2025 Estimate	FY2025-2026 Projected	Over/Under Current Year Estimate
SOURCE						
RV4-TAX COMM EXP	4550087	FEES-OTH-ASSESSMENT	3,057,658	3,387,438	3,368,178	(19,260)
RV4-TAX COMM EXP	4550485	FEES-OTHER-INTEREST	2,111	—	—	—
RV4-TAX COMM EXP	4550486	FEES-OTH-PUBLIC SRV	26	—	—	—
RV4-TAX COMM EXP	4830016	PY CASH CARRYOVER	2,276,328	2,115,977	1,927,579	(188,398)
Total Collections/Income			\$5,336,123	\$5,503,415	\$5,295,757	\$(207,658)
TYPE						
Expenditures Source of Funding Form (BR-6)			3,220,147	3,387,438	3,368,178	(19,260)
Carryover			2,115,976	2,115,977	1,927,579	(188,398)
Total Expenditures, Transfers and Carry Forwards to Next FY			\$5,336,123	\$5,503,415	\$5,295,757	\$(207,658)
Difference in Total Collections/Income and Total Expenditures, Transfers and Carry Forwards to Next FY			—	—	—	—

Justification of Differences

Form 35148 — LTC FEE

Question	Narrative Response
Explain any transfers to other appropriations.	
Break out INA by Source of Funding.	
Additional information or comments.	

SCHEDULE OF REQUESTED EXPENDITURES

1061 - Property Taxation Regulatory/Oversight

Travel

FY2025-2026 Request	Description
1,565	ADMIN, EDUCATIONAL, SEMINARS, CONFERENCES
1,831	ADMINISTRATIVE TRAVEL
75,542	FIELD TRAVEL, EDUCATIONAL, SEMINARS, CONFERENCES
84,645	OUT OF STATE TRAVEL
\$163,583	Total Travel

Operating Services

FY2025-2026 Request	Description
3,671	DATA PROCESSING
11,163	EQUIPMENT RENTAL
3,546	INTERNET SERVICE
21,531	MAIL AND POSTAGE
36,241	MEMBERSHIP AND SUBSCRIPTION
1,083	PRINTING
17,266	VARIOUS MISC EXP.
\$94,501	Total Operating Services

Supplies

FY2025-2026 Request	Description
6,916	COMPUTER SUPPLIES
12,469	OFFICE SUPPLIES
1,063	UNIFORMS
\$20,448	Total Supplies

Professional Services

FY2025-2026 Request	Means of Financing	Description
322,057	Tax Commission Expense Dedicated Fund Account	
\$322,057		LEGAL CONTRACT-FAIRCLOTH
\$322,057	Total Professional Services	

Other Charges

FY2025-2026 Request	Means of Financing	Description
50,000	Tax Commission Expense Dedicated Fund Account	
\$50,000		TRENDSIC-WEBSITE,PARTS AND TAMS
\$50,000	Total Other Charges	

Interagency Transfers

FY2025-2026 Request	Means of Financing	Receiving Agency	Description
16,851	State General Fund		
\$16,851		PUB SAFETY OFF OF MGMT & FIN	CAPITAL PARK SECURITY
14,952	State General Fund		
\$14,952		STATE CIVIL SERVICE	CIVIL SERVICE
40,200	State General Fund		
\$40,200		LEGISLATIVE AUDITOR	LOUISIANA LEGISLATIVE AUDITORS
3,040	State General Fund		
\$3,040		DIVISION OF ADMINISTRATION	LOUISIANA STATE REGISTER
33,361	State General Fund		
\$33,361		DIVISION OF ADMINISTRATION	OFFICE OF HUMAN RESOURCES
326,578	State General Fund		
\$326,578		DOA-OFFICE OF ST PROCUREMENT	OFFICE OF STATE PURCHASING
1,766	State General Fund		
\$1,766		UNIFORM PAYROLL OFFICE	OFFICE OF UNIFORM PAYROLL

Interagency Transfers *(continued)*

FY2025-2026 Request	Means of Financing	Receiving Agency	Description
176,717	Tax Commission Expense Dedicated Fund Account		
\$176,717		DIVISION OF ADMINISTRATION	ORM-41854,OFSS 1766 RENT68304, OTS 244438
1,179	State General Fund		
\$1,179		DOA-OFFICE OF TECHNOLOGY SVCS	STATE PRINTING
\$614,644	Total Interagency Transfers		



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Continuation Budget Adjustments

AGENCY SUMMARY STATEMENT

Total Agency

Means of Financing

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
STATE GENERAL FUND (Direct)	2,058,414	—	348	53,489	—	32,070	2,144,321
STATE GENERAL FUND BY:	—	—	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—	—	—
FEES & SELF-GENERATED	3,387,438	—	12,810	—	—	(32,070)	3,368,178
STATUTORY DEDICATIONS	—	—	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,445,852	—	\$13,158	\$53,489	—	—	\$5,512,499

Fees and Self-Generated

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
Tax Commission Expense Dedicated Fund Account	3,387,438	—	12,810	—	—	(32,070)	3,368,178
Total:	\$3,387,438	—	\$12,810	—	—	\$(32,070)	\$3,368,178

Statutory Dedications

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
Total:	—	—	—	—	—	—	—

Expenditures and Positions

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
Salaries	2,616,861	—	—	100,423	—	—	2,717,284
Other Compensation	50,000	—	—	—	—	—	50,000
Related Benefits	1,526,916	—	—	(46,934)	—	—	1,479,982
TOTAL PERSONAL SERVICES	\$4,193,777	—	—	\$53,489	—	—	\$4,247,266
Travel	160,000	—	3,583	—	—	—	163,583
Operating Services	92,431	—	2,070	—	—	—	94,501
Supplies	20,000	—	448	—	—	—	20,448
TOTAL OPERATING EXPENSES	\$272,431	—	\$6,101	—	—	—	\$278,532
PROFESSIONAL SERVICES	\$315,000	—	\$7,057	—	—	—	\$322,057
Other Charges	50,000	—	—	—	—	—	50,000
Debt Service	—	—	—	—	—	—	—
Interagency Transfers	614,644	—	—	—	—	—	614,644
TOTAL OTHER CHARGES	\$664,644	—	—	—	—	—	\$664,644
Acquisitions	—	—	—	—	—	—	—
Major Repairs	—	—	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—	—	—	—
TOTAL EXPENDITURES	\$5,445,852	—	\$13,158	\$53,489	—	—	\$5,512,499
Classified	30	—	—	—	—	—	30
Unclassified	6	—	—	—	—	—	6
TOTAL AUTHORIZED T.O. POSITIONS	36	—	—	—	—	—	36
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	—	—	—	—	—	1

CONTINUATION BUDGET ADJUSTMENTS - SUMMARIZED

Form 37216 — Inflation Factor

Means of Financing

	Amount
STATE GENERAL FUND (Direct)	348
STATE GENERAL FUND BY:	—
INTERAGENCY TRANSFERS	—
FEES & SELF-GENERATED	12,810
STATUTORY DEDICATIONS	—
FEDERAL FUNDS	—
TOTAL MEANS OF FINANCING	\$13,158

Expenditures

	Amount
Salaries	—
Other Compensation	—
Related Benefits	—
TOTAL PERSONAL SERVICES	—
Travel	3,583
Operating Services	2,070
Supplies	448
TOTAL OPERATING EXPENSES	\$6,101
PROFESSIONAL SERVICES	\$7,057
Other Charges	—
Debt Service	—
Interagency Transfers	—
TOTAL OTHER CHARGES	—
Acquisitions	—
Major Repairs	—
TOTAL ACQ. & MAJOR REPAIRS	—
TOTAL EXPENDITURES	\$13,158

Positions

	FTE
Classified	—
Unclassified	—
TOTAL AUTHORIZED T.O. POSITIONS	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—
TOTAL NON-T.O. FTE POSITIONS	—

Continuation Budget Adjustments - Summarized

Total Agency
Request Type: COMPULSORY

Form 36862 — 106- Salaries and Benefits
Means of Financing

	Amount
STATE GENERAL FUND (Direct)	53,489
STATE GENERAL FUND BY:	—
INTERAGENCY TRANSFERS	—
FEES & SELF-GENERATED	—
STATUTORY DEDICATIONS	—
FEDERAL FUNDS	—
TOTAL MEANS OF FINANCING	\$53,489

Expenditures

	Amount
Salaries	100,423
Other Compensation	—
Related Benefits	(46,934)
TOTAL PERSONAL SERVICES	\$53,489
Travel	—
Operating Services	—
Supplies	—
TOTAL OPERATING EXPENSES	—
PROFESSIONAL SERVICES	—
Other Charges	—
Debt Service	—
Interagency Transfers	—
TOTAL OTHER CHARGES	—
Acquisitions	—
Major Repairs	—
TOTAL ACQ. & MAJOR REPAIRS	—
TOTAL EXPENDITURES	\$53,489

Positions

	FTE
Classified	—
Unclassified	—
TOTAL AUTHORIZED T.O. POSITIONS	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—
TOTAL NON-T.O. FTE POSITIONS	—

Continuation Budget Adjustments - Summarized

Total Agency
Request Type: OTHER

**Form 37350 — 106-MOF salary, due to less fee and sg
Means of Financing**

	Amount
STATE GENERAL FUND (Direct)	32,070
STATE GENERAL FUND BY:	—
INTERAGENCY TRANSFERS	—
FEES & SELF-GENERATED	(32,070)
STATUTORY DEDICATIONS	—
FEDERAL FUNDS	—
TOTAL MEANS OF FINANCING	—

Expenditures

	Amount
Salaries	—
Other Compensation	—
Related Benefits	—
TOTAL PERSONAL SERVICES	—
Travel	—
Operating Services	—
Supplies	—
TOTAL OPERATING EXPENSES	—
PROFESSIONAL SERVICES	—
Other Charges	—
Debt Service	—
Interagency Transfers	—
TOTAL OTHER CHARGES	—
Acquisitions	—
Major Repairs	—
TOTAL ACQ. & MAJOR REPAIRS	—
TOTAL EXPENDITURES	—

Positions

	FTE
Classified	—
Unclassified	—
TOTAL AUTHORIZED T.O. POSITIONS	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—
TOTAL NON-T.O. FTE POSITIONS	—

PROGRAM SUMMARY STATEMENT

1061 - Property Taxation Regulatory/Oversight

Means of Financing

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
STATE GENERAL FUND (Direct)	2,058,414	—	348	53,489	—	32,070	2,144,321
STATE GENERAL FUND BY:	—	—	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—	—	—
FEEES & SELF-GENERATED	3,387,438	—	12,810	—	—	(32,070)	3,368,178
STATUTORY DEDICATIONS	—	—	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,445,852	—	\$13,158	\$53,489	—	—	\$5,512,499

Fees and Self-Generated

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
Tax Commission Expense Dedicated Fund Account	3,387,438	—	12,810	—	—	(32,070)	3,368,178
Total:	\$3,387,438	—	\$12,810	—	—	\$(32,070)	\$3,368,178

Expenditures and Positions

Description	Existing Operating Budget as of 10/01/2024	Non-Recurring	Inflation	Compulsory	Workload	Other	FY2025-2026 Requested Continuation Level
Salaries	2,616,861	—	—	100,423	—	—	2,717,284
Other Compensation	50,000	—	—	—	—	—	50,000
Related Benefits	1,526,916	—	—	(46,934)	—	—	1,479,982
TOTAL PERSONAL SERVICES	\$4,193,777	—	—	\$53,489	—	—	\$4,247,266
Travel	160,000	—	3,583	—	—	—	163,583
Operating Services	92,431	—	2,070	—	—	—	94,501
Supplies	20,000	—	448	—	—	—	20,448
TOTAL OPERATING EXPENSES	\$272,431	—	\$6,101	—	—	—	\$278,532
PROFESSIONAL SERVICES	\$315,000	—	\$7,057	—	—	—	\$322,057
Other Charges	50,000	—	—	—	—	—	50,000
Debt Service	—	—	—	—	—	—	—
Interagency Transfers	614,644	—	—	—	—	—	614,644
TOTAL OTHER CHARGES	\$664,644	—	—	—	—	—	\$664,644
Acquisitions	—	—	—	—	—	—	—
Major Repairs	—	—	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—	—	—	—
TOTAL EXPENDITURES	\$5,445,852	—	\$13,158	\$53,489	—	—	\$5,512,499
Classified	30	—	—	—	—	—	30
Unclassified	6	—	—	—	—	—	6
TOTAL AUTHORIZED T.O. POSITIONS	36	—	—	—	—	—	36
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	—	—	—	—	—	1

CONTINUATION BUDGET ADJUSTMENTS - BY PROGRAM

Form 37216 — Inflation Factor

1061 - Property Taxation Regulatory/Oversight

Means of Financing

	Amount
STATE GENERAL FUND (Direct)	348
STATE GENERAL FUND BY:	—
INTERAGENCY TRANSFERS	—
FEES & SELF-GENERATED	12,810
STATUTORY DEDICATIONS	—
FEDERAL FUNDS	—
TOTAL MEANS OF FINANCING	\$13,158

Expenditures

	Amount
Salaries	—
Other Compensation	—
Related Benefits	—
TOTAL PERSONAL SERVICES	—
Travel	3,583
Operating Services	2,070
Supplies	448
TOTAL OPERATING EXPENSES	\$6,101
PROFESSIONAL SERVICES	\$7,057
Other Charges	—
Debt Service	—
Interagency Transfers	—
TOTAL OTHER CHARGES	—
Acquisitions	—
Major Repairs	—
TOTAL ACQ. & MAJOR REPAIRS	—
TOTAL EXPENDITURES	\$13,158

Positions

	FTE
Classified	—
Unclassified	—
TOTAL AUTHORIZED T.O. POSITIONS	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—
TOTAL NON-T.O. FTE POSITIONS	—

Fees and Self-Generated

	Amount
Tax Commission Expense Dedicated Fund Account	12,810
Total:	\$12,810

Statutory Dedications

	Amount
Total:	—

Supporting Detail

Means of Financing

Description	Amount
State General Fund	348
Tax Commission Expense Dedicated Fund Account	12,810
Total:	\$13,158

Travel

Commitment item	Name	Amount
5210010	IN-STATE TRAVEL-ADM	40
5210015	IN-STATE TRAVEL-CONF	34
5210020	IN-STATE TRAV-FIELD	1,854
5210025	IN-STATE TRV-BD MEM	547
5210030	IN-STATE TRV-IT/TRN	7
5210060	OUT-OF-STTRV-FIELD	1,101
Total:		\$3,583

Operating Services

Commitment item	Name	Amount
5310005	SERV-PRINTING	13
5310010	SERV-DUES & OTHER	794
5310400	SERV-MISC	378
5330017	MAINT-DATA SOFTWARE	78
5340020	RENT-EQUIPMENT	245
5350001	UTIL-INTERNET PROVID	80
5350006	UTIL-MAIL/DEL/POST	482
Total:		\$2,070

Supplies

Commitment item	Name	Amount
5410001	SUP-OFFICE SUPPLIES	273
5410006	SUP-COMPUTER	152
5410007	SUP-CLOTHING/UNIFORM	23
Total:		\$448

Professional Services

Commitment item	Name	Amount
5510005	PROF SERV-LEGAL	7,057
Total:		\$7,057

Form 36862 — 106- Salaries and Benefits

1061 - Property Taxation Regulatory/Oversight

MEANS OF FINANCING

	Amount
STATE GENERAL FUND (Direct)	53,489
STATE GENERAL FUND BY:	—
INTERAGENCY TRANSFERS	—
FEES & SELF-GENERATED	—
STATUTORY DEDICATIONS	—
FEDERAL FUNDS	—
TOTAL MEANS OF FINANCING	\$53,489

EXPENDITURES

	Amount
Salaries	100,423
Other Compensation	—
Related Benefits	(46,934)
TOTAL PERSONAL SERVICES	\$53,489
Travel	—
Operating Services	—
Supplies	—
TOTAL OPERATING EXPENSES	—
PROFESSIONAL SERVICES	—
Other Charges	—
Debt Service	—
Interagency Transfers	—
TOTAL OTHER CHARGES	—
Acquisitions	—
Major Repairs	—
TOTAL ACQ. & MAJOR REPAIRS	—
TOTAL EXPENDITURES	\$53,489

AUTHORIZED POSITIONS

	FTE
Classified	—
Unclassified	—
TOTAL AUTHORIZED T.O. POSITIONS	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—
TOTAL NON-T.O. FTE POSITIONS	—

Statutory Dedications

	Amount
Total:	—

Question	Narrative Response
Explain the need for this request.	Salaries and benefit projected for FY 25-26
Cite performance indicators for the adjustment.	NA
What would the impact be if this is not funded?	This is needed for Agency to perform adequately.
Is revenue a fixed amount or can it be adjusted?	NA
Is the expenditure of these revenues restricted?	NA
Additional information or comments.	NA

Form 37350 — 106-MOF salary, due to less fee and sg

1061 - Property Taxation Regulatory/Oversight

MEANS OF FINANCING

	Amount
STATE GENERAL FUND (Direct)	32,070
STATE GENERAL FUND BY:	—
INTERAGENCY TRANSFERS	—
FEES & SELF-GENERATED	(32,070)
STATUTORY DEDICATIONS	—
FEDERAL FUNDS	—
TOTAL MEANS OF FINANCING	—

EXPENDITURES

	Amount
Salaries	—
Other Compensation	—
Related Benefits	—
TOTAL PERSONAL SERVICES	—
Travel	—
Operating Services	—
Supplies	—
TOTAL OPERATING EXPENSES	—
PROFESSIONAL SERVICES	—
Other Charges	—
Debt Service	—
Interagency Transfers	—
TOTAL OTHER CHARGES	—
Acquisitions	—
Major Repairs	—
TOTAL ACQ. & MAJOR REPAIRS	—
TOTAL EXPENDITURES	—

AUTHORIZED POSITIONS

	FTE
Classified	—
Unclassified	—
TOTAL AUTHORIZED T.O. POSITIONS	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—
TOTAL NON-T.O. FTE POSITIONS	—

Fees and Self-Generated

	Amount
Tax Commission Expense Dedicated Fund Account	(32,070)
Total:	\$(32,070)

Statutory Dedications

	Amount
Total:	—

Question	Narrative Response
Explain the need for this request.	
Cite performance indicators for the adjustment.	
What would the impact be if this is not funded?	
Is revenue a fixed amount or can it be adjusted?	
Is the expenditure of these revenues restricted?	
Additional information or comments.	

Technical and Other Adjustments

AGENCY SUMMARY STATEMENT

Total Agency

Means of Financing	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in this Adjustment Package	FY2025-2026 Requested Realignment
STATE GENERAL FUND (Direct)	2,058,414	85,907	—	2,144,321
STATE GENERAL FUND BY:	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—
FEES & SELF-GENERATED	3,387,438	(19,260)	—	3,368,178
STATUTORY DEDICATIONS	—	—	—	—
FEDERAL FUNDS	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,445,852	\$66,647	—	\$5,512,499
Salaries	2,616,861	100,423	—	2,717,284
Other Compensation	50,000	—	—	50,000
Related Benefits	1,526,916	(46,934)	—	1,479,982
TOTAL PERSONAL SERVICES	\$4,193,777	\$53,489	—	\$4,247,266
Travel	160,000	3,583	—	163,583
Operating Services	92,431	2,070	—	94,501
Supplies	20,000	448	—	20,448
TOTAL OPERATING EXPENSES	\$272,431	\$6,101	—	\$278,532
PROFESSIONAL SERVICES	\$315,000	\$7,057	—	\$322,057
Other Charges	50,000	—	—	50,000
Debt Service	—	—	—	—
Interagency Transfers	614,644	—	—	614,644
TOTAL OTHER CHARGES	\$664,644	—	—	\$664,644
Acquisitions	—	—	—	—
Major Repairs	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—
TOTAL EXPENDITURES	\$5,445,852	\$66,647	—	\$5,512,499
Classified	30	—	—	30
Unclassified	6	—	—	6
TOTAL AUTHORIZED T.O. POSITIONS	36	—	—	36
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	—	—	1

PROGRAM BREAKOUT

Means of Financing	Requested in this Adjustment Package	1061 Property Taxation Regulatory/Oversight
STATE GENERAL FUND (Direct)	—	—
STATE GENERAL FUND BY:	—	—
INTERAGENCY TRANSFERS	—	—
FEES & SELF-GENERATED	—	—
STATUTORY DEDICATIONS	—	—
FEDERAL FUNDS	—	—
TOTAL MEANS OF FINANCING	—	—
Salaries	—	—
Other Compensation	—	—
Related Benefits	—	—
TOTAL SALARIES	—	—
Travel	—	—
Operating Services	—	—
Supplies	—	—
TOTAL OPERATING EXPENSES	—	—
PROFESSIONAL SERVICES	—	—
Other Charges	—	—
Debt Service	—	—
Interagency Transfers	—	—
TOTAL OTHER CHARGES	—	—
Acquisitions	—	—
Major Repairs	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—
TOTAL EXPENDITURES & REQUEST	—	—
Classified	—	—
Unclassified	—	—
TOTAL AUTHORIZED T.O. POSITIONS	—	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—
TOTAL NON-T.O. FTE POSITIONS	—	—

PROGRAM SUMMARY STATEMENT

1061 - Property Taxation Regulatory/Oversight

Means of Financing	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in this Adjustment Package	FY2025-2026 Requested Realignment
STATE GENERAL FUND (Direct)	2,058,414	85,907	—	2,144,321
STATE GENERAL FUND BY:	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—
FEES & SELF-GENERATED	3,387,438	(19,260)	—	3,368,178
STATUTORY DEDICATIONS	—	—	—	—
FEDERAL FUNDS	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,445,852	\$66,647	—	\$5,512,499
Salaries	2,616,861	100,423	—	2,717,284
Other Compensation	50,000	—	—	50,000
Related Benefits	1,526,916	(46,934)	—	1,479,982
TOTAL PERSONAL SERVICES	\$4,193,777	\$53,489	—	\$4,247,266
Travel	160,000	3,583	—	163,583
Operating Services	92,431	2,070	—	94,501
Supplies	20,000	448	—	20,448
TOTAL OPERATING EXPENSES	\$272,431	\$6,101	—	\$278,532
PROFESSIONAL SERVICES	\$315,000	\$7,057	—	\$322,057
Other Charges	50,000	—	—	50,000
Debt Service	—	—	—	—
Interagency Transfers	614,644	—	—	614,644
TOTAL OTHER CHARGES	\$664,644	—	—	\$664,644
Acquisitions	—	—	—	—
Major Repairs	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—
TOTAL EXPENDITURES	\$5,445,852	\$66,647	—	\$5,512,499
Classified	30	—	—	30
Unclassified	6	—	—	6
TOTAL AUTHORIZED T.O. POSITIONS	36	—	—	36
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	—	—	1

New or Expanded Requests

AGENCY SUMMARY STATEMENT

Total Agency

Means of Financing and Expenditures	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in Technical/Other Package	FY2025-2026 Requested New/Expanded	FY2025-2026 Requested Realignment
STATE GENERAL FUND (Direct)	2,058,414	85,907	—	—	2,144,321
STATE GENERAL FUND BY:	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—
FEES & SELF-GENERATED	3,387,438	(19,260)	—	—	3,368,178
STATUTORY DEDICATIONS	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,445,852	\$66,647	—	—	\$5,512,499
Salaries	2,616,861	100,423	—	—	2,717,284
Other Compensation	50,000	—	—	—	50,000
Related Benefits	1,526,916	(46,934)	—	—	1,479,982
TOTAL PERSONAL SERVICES	\$4,193,777	\$53,489	—	—	\$4,247,266
Travel	160,000	3,583	—	—	163,583
Operating Services	92,431	2,070	—	—	94,501
Supplies	20,000	448	—	—	20,448
TOTAL OPERATING EXPENSES	\$272,431	\$6,101	—	—	\$278,532
PROFESSIONAL SERVICES	\$315,000	\$7,057	—	—	\$322,057
Other Charges	50,000	—	—	—	50,000
Debt Service	—	—	—	—	—
Interagency Transfers	614,644	—	—	—	614,644
TOTAL OTHER CHARGES	\$664,644	—	—	—	\$664,644
Acquisitions	—	—	—	—	—
Major Repairs	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—	—
TOTAL EXPENDITURES	\$5,445,852	\$66,647	—	—	\$5,512,499
Classified	30	—	—	—	30
Unclassified	6	—	—	—	6
TOTAL AUTHORIZED T.O. POSITIONS	36	—	—	—	36
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	—	—	—	1

Fees and Self-Generated

Description	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in Technical/Other Package	FY2025-2026 Requested New/Expanded	FY2025-2026 Requested Realignment
Tax Commission Expense Dedicated Fund Account	3,387,438	(19,260)	—	—	3,368,178
Total:	\$3,387,438	\$(19,260)	—	—	\$3,368,178

Statutory Dedications

Description	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in Technical/Other Package	FY2025-2026 Requested New/Expanded	FY2025-2026 Requested Realignment
Total:	—	—	—	—	—

PROGRAM SUMMARY STATEMENT

1061 - Property Taxation Regulatory/Oversight

Means of Financing and Expenditures	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in Technical/Other Package	FY2025-2026 Requested New/Expanded	FY2025-2026 Requested Realignment
STATE GENERAL FUND (Direct)	2,058,414	85,907	—	—	2,144,321
STATE GENERAL FUND BY:	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—
FEES & SELF-GENERATED	3,387,438	(19,260)	—	—	3,368,178
STATUTORY DEDICATIONS	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,445,852	\$66,647	—	—	\$5,512,499
Salaries	2,616,861	100,423	—	—	2,717,284
Other Compensation	50,000	—	—	—	50,000
Related Benefits	1,526,916	(46,934)	—	—	1,479,982
TOTAL PERSONAL SERVICES	\$4,193,777	\$53,489	—	—	\$4,247,266
Travel	160,000	3,583	—	—	163,583
Operating Services	92,431	2,070	—	—	94,501
Supplies	20,000	448	—	—	20,448
TOTAL OPERATING EXPENSES	\$272,431	\$6,101	—	—	\$278,532
PROFESSIONAL SERVICES	\$315,000	\$7,057	—	—	\$322,057
Other Charges	50,000	—	—	—	50,000
Debt Service	—	—	—	—	—
Interagency Transfers	614,644	—	—	—	614,644
TOTAL OTHER CHARGES	\$664,644	—	—	—	\$664,644
Acquisitions	—	—	—	—	—
Major Repairs	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	—	—	—	—	—
TOTAL EXPENDITURES	\$5,445,852	\$66,647	—	—	\$5,512,499
Classified	30	—	—	—	30
Unclassified	6	—	—	—	6
TOTAL AUTHORIZED T.O. POSITIONS	36	—	—	—	36
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	—	—	—	1

Fees and Self-Generated

Description	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in Technical/Other Package	FY2025-2026 Requested New/Expanded	FY2025-2026 Requested Realignment
Tax Commission Expense Dedicated Fund Account	3,387,438	(19,260)	—	—	3,368,178
Total:	\$3,387,438	\$(19,260)	—	—	\$3,368,178

Statutory Dedications

Description	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustment	FY2025-2026 Requested in Technical/Other Package	FY2025-2026 Requested New/Expanded	FY2025-2026 Requested Realignment
Total:	—	—	—	—	—



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Total Request Summary

AGENCY SUMMARY STATEMENT

Total Agency

Means of Financing

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustments	FY2025-2026 Requested in Technical/Other Adjustments	FY2025-2026 Requested New or Expanded Adjustments	FY2025-2026 Total Request	Over/Under EOB
STATE GENERAL FUND (Direct)	1,968,912	2,058,414	85,907	—	—	2,144,321	85,907
STATE GENERAL FUND BY:	—	—	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—	—	—
FEES & SELF-GENERATED	3,220,147	3,387,438	(19,260)	—	—	3,368,178	(19,260)
STATUTORY DEDICATIONS	—	—	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,189,059	\$5,445,852	\$66,647	—	—	\$5,512,499	\$66,647

Statutory Dedications

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustments	FY2025-2026 Requested in Technical/Other Adjustments	FY2025-2026 Requested New or Expanded Adjustments	FY2025-2026 Total Request	Over/Under EOB
Total:	—	—	—	—	—	—	—

Expenditures and Positions

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustments	FY2025-2026 Requested in Technical/Other Adjustments	FY2025-2026 Requested New or Expanded Adjustments	FY2025-2026 Total Request	Over/Under EOB
Salaries	2,514,476	2,616,861	100,423	—	—	2,717,284	100,423
Other Compensation	15,976	50,000	—	—	—	50,000	—
Related Benefits	1,568,615	1,526,916	(46,934)	—	—	1,479,982	(46,934)
TOTAL PERSONAL SERVICES	\$4,099,066	\$4,193,777	\$53,489	—	—	\$4,247,266	\$53,489
Travel	168,258	160,000	3,583	—	—	163,583	3,583
Operating Services	90,537	92,431	2,070	—	—	94,501	2,070
Supplies	18,772	20,000	448	—	—	20,448	448
TOTAL OPERATING EXPENSES	\$277,567	\$272,431	\$6,101	—	—	\$278,532	\$6,101
PROFESSIONAL SERVICES	\$207,625	\$315,000	\$7,057	—	—	\$322,057	\$7,057
Other Charges	—	50,000	—	—	—	50,000	—
Debt Service	—	—	—	—	—	—	—
Interagency Transfers	586,682	614,644	—	—	—	614,644	—
TOTAL OTHER CHARGES	\$586,682	\$664,644	—	—	—	\$664,644	—
Acquisitions	18,118	—	—	—	—	—	—
Major Repairs	—	—	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	\$18,118	—	—	—	—	—	—
TOTAL EXPENDITURES	\$5,189,059	\$5,445,852	\$66,647	—	—	\$5,512,499	\$66,647
Classified	30	30	—	—	—	30	—
Unclassified	6	6	—	—	—	6	—
TOTAL AUTHORIZED T.O. POSITIONS	36	36	—	—	—	36	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	1	—	—	—	1	—

PROGRAM SUMMARY STATEMENT

1061 - Property Taxation Regulatory/Oversight

Means of Financing

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustments	FY2025-2026 Requested in Technical/Other Adjustments	FY2025-2026 Requested New or Expanded Adjustments	FY2025-2026 Total Request	Over/Under EOB
STATE GENERAL FUND (Direct)	1,968,912	2,058,414	85,907	—	—	2,144,321	85,907
STATE GENERAL FUND BY:	—	—	—	—	—	—	—
INTERAGENCY TRANSFERS	—	—	—	—	—	—	—
FEES & SELF-GENERATED	3,220,147	3,387,438	(19,260)	—	—	3,368,178	(19,260)
STATUTORY DEDICATIONS	—	—	—	—	—	—	—
FEDERAL FUNDS	—	—	—	—	—	—	—
TOTAL MEANS OF FINANCING	\$5,189,059	\$5,445,852	\$66,647	—	—	\$5,512,499	\$66,647

Expenditures and Positions

Description	FY2023-2024 Actuals	Existing Operating Budget as of 10/01/2024	FY2025-2026 Requested Continuation Adjustments	FY2025-2026 Requested in Technical/Other Adjustments	FY2025-2026 Requested New or Expanded Adjustments	FY2025-2026 Total Request	Over/Under EOB
Salaries	2,514,476	2,616,861	100,423	—	—	2,717,284	100,423
Other Compensation	15,976	50,000	—	—	—	50,000	—
Related Benefits	1,568,615	1,526,916	(46,934)	—	—	1,479,982	(46,934)
TOTAL PERSONAL SERVICES	\$4,099,066	\$4,193,777	\$53,489	—	—	\$4,247,266	\$53,489
Travel	168,258	160,000	3,583	—	—	163,583	3,583
Operating Services	90,537	92,431	2,070	—	—	94,501	2,070
Supplies	18,772	20,000	448	—	—	20,448	448
TOTAL OPERATING EXPENSES	\$277,567	\$272,431	\$6,101	—	—	\$278,532	\$6,101
PROFESSIONAL SERVICES	\$207,625	\$315,000	\$7,057	—	—	\$322,057	\$7,057
Other Charges	—	50,000	—	—	—	50,000	—
Debt Service	—	—	—	—	—	—	—
Interagency Transfers	586,682	614,644	—	—	—	614,644	—
TOTAL OTHER CHARGES	\$586,682	\$664,644	—	—	—	\$664,644	—
Acquisitions	18,118	—	—	—	—	—	—
Major Repairs	—	—	—	—	—	—	—
TOTAL ACQ. & MAJOR REPAIRS	\$18,118	—	—	—	—	—	—
TOTAL EXPENDITURES	\$5,189,059	\$5,445,852	\$66,647	—	—	\$5,512,499	\$66,647
Classified	30	30	—	—	—	30	—
Unclassified	6	6	—	—	—	6	—
TOTAL AUTHORIZED T.O. POSITIONS	36	36	—	—	—	36	—
TOTAL AUTHORIZED OTHER CHARGES POSITIONS	—	—	—	—	—	—	—
TOTAL NON-T.O. FTE POSITIONS	1	1	—	—	—	1	—

Addenda

INTERAGENCY TRANSFERS

State of Louisiana Division of Administration
 Office of State Procurement
 PO Box 94095
 Baton Rouge, LA 70804-9095
 (225) 342-8010

INVOICE

DATE: August 2, 2024
 INVOICE # 25-106
 FOR: FY25 IAT Procurement Services

Bill To:
 Louisiana Tax Commission

For Fiscal Year 2024-2025 (FY25), the Office of State Procurement (OSP) is budgeted and authorized to receive payment in the amount(s) specified below from the Sending Agency for its estimated proportional utilization of OSP Ancillary Services (purchasing, contractual review, and RFPs).

Agency	FY25 Appropriated	Prior Year Credit	Net FY25 Amount Due
01-106 Louisiana Tax Commission	\$5,219.00	-\$3,060.00	\$2,159.00
TOTAL AMOUNT DUE			\$ 2,159.00

If your agency is a LaGov agency, please provide coding below.

Business Area*	Fund*	Cost Center*	GL*	WBS Element	Grant	Order	Amount*
106	1060008000	1061017010	5950059				2159.00
			5950059				
			5950059				
			5950059				
			5950059				

*Required Coding

Total: 2159.00

Authorized By:

R. J. Davis
 Sending Agency Management/Finance Officer
Royal Davis@la.gov
 Sending Agency Email Address

10/18/24
 Date
225 21 90329
 Phone Number

Please confirm your receipt of this billing notice by completing the information requested and returning it to this office at OSP-Reports@la.gov no later than Tuesday, September 3, 2024.

If you have any questions concerning this invoice, please contact OSP at OSP-Reports@la.gov

Facility Planning and Control
State of Louisiana
Division of Administration

JEFF LANDRY
GOVERNOR



TAYLOR F. BARRAS
COMMISSIONER OF ADMINISTRATION

May 29, 2024

Mr. Michael Matherne, Administrator
Louisiana Tax Commission
1051 North Third Street, 2nd Floor
Baton Rouge, LA 70802

RE: Lease - Lease between the Division of Administration
and the Louisiana Tax Commission
State Capitol Annex Building
1051 North Third Street, 2nd Floor
Baton Rouge, Louisiana
Lease number 01-10225

Dear Mr. Matherne:

In accordance with Paragraph 3 of the referenced lease, please accept this letter as notice that the above referenced lease has automatically renewed for another twelve-month period, beginning July 1, 2024 and ending June 30, 2025. The rental rate for the twelve-month period will be \$7.057229 per square foot for 10,580 square feet, or \$6,222.12 per month.

Please direct inquiries regarding the rental rate to Ms. Kerri Traxler at (225) 342-5943. Please direct any inquiries regarding square footage to Mr. Mitch Melancon at (225) 219-4794. All other inquiries should be directed to the Office of Facility Planning and Control, Real Estate Leasing Section at (225) 342-0820.

Please note that the referenced space cannot be vacated without prior approval from the Division of Administration (DOA). If space is vacated without written DOA approval, rentals will continue to be collected for the current year, and each subsequent year, until such approval is obtained.

Sincerely,

Roger E. Husser, Jr., Director
Facility Planning and Control

c: Real Estate Leasing File
Ms. Kerri Traxler
Mr. Mitch Melancon

1760
24,222.8

6222.12 x 12 = 74,665.44

paid 7/11/24

INTERAGENCY AGREEMENT

Interagency Agreement Between

For Fiscal Year 2022-2024

from

DIVISION OF ADMINISTRATION - OFFICE OF HUMAN RESOURCES (107) and LOUISIANA TAX COMMISSION (106)
(Recipient Agency and #) (Sending Agency and #)

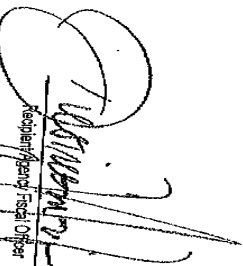
DIVISION OF ADMINISTRATION - OFFICE OF HUMAN RESOURCES (107) is budgeted to receive the following revenue
(Agency and #)

LOUISIANA TAX COMMISSION (106)
(Agency and #)

by interagency transfer for the following reason(s):

Provide Human Resources services

\$6,126


 Recipient Agency Fiscal Officer

10/6/2022
Date

R. Davis
 Sending Agency Fiscal Officer

10/10/2022
Date

NOTE:
 It is the Receiving Agency's responsibility to ensure the execution of this Agreement.
 Both Agencies must submit copies of this Agreement with their Budget Request (and any subsequent BAs as recommended by I.A.T. revenue and I.A.T. expense).

State of Louisiana Division of Administration
Office of Finance and Support Services
PO Box 94095
Baton Rouge, LA 70804-9095
(225) 342-0700

INVOICE

DATE: August 23, 2022
INVOICE #: 23-1114-12
FOR: FY 23 IAT DOA - Office
of Human Resources

Bill To:
LOUISIANA TAX COMMISSION

DESCRIPTION	AMOUNT
Payment Request for DOA - Office of Human Resources FY22 (07/01/22-06/30/23)	33,969.00
TOTAL	\$ 33,969.00

Payment Details

Payment for the services provided to your agency are required via a ZB. This invoice serves as support for remitting the funds. Please access the ZB initiated by our office and enter the expenditure coding and get approvals required to complete the processing of this transaction.

If you have any questions concerning this invoice, please contact Lakeisha Ard at (225) 342-6002 or Lakeisha.Ard@la.gov.

Paid 8/24/22

FY23 OSP INTERAGENCY AGREEMENT

Interagency Agreement between the
Office of State Procurement (21-320)
(Recipient Agency)

and the
Louisiana Tax Commission (01-106)
(Sending Agency)

For Fiscal Year 2022-2023 (FY23), the Office of State Procurement (OSP) is budgeted and authorized to receive revenue in the amount(s) specified below, from the Sending Agency named above, by Interagency Transfer (IAT) of funding which has been appropriated to the Sending Agency for such purpose.

This IAT reimburses OSP for the Sending Agency's estimated proportional utilization of OSP Auxiliary Services (purchasing, contractual review and RFPs).

Agency	FY23 Appropriated	Prior Year Credit	Net FY23 Amt. Due
01-106 Louisiana Tax Commission	\$3,237.00	-\$725.00	\$2,512.00
Totals:	\$3,237.00	-\$725.00	\$2,512.00

Authorized By:

Matthew Matthew
Matthew Matthew, AD - Office of State Procurement
Date: 8/18/2022

[Signature]
Sending Agency Management/Finance Officer
Date: 8/22/22

Ralph Lewis
Sending Agency email Address
Phone Number

Agency Payment Coding (Below and/or Attached):

Amount: \$2,512.00
Agency Bus. Area: 106
General Ledger: 595000
Cost Center: 106017010
Fund: 106000000

Internal Order: _____
Grant/MS: _____
Fund: _____
Cost Center: _____

Amount: _____
Agency Bus. Area: _____
General Ledger: _____
Cost Center: _____
Fund: _____
Grant/MS: _____
Internal Order: _____

Billing Preference (Please select one option):

Annually (Recommended)
 Bi-Annually
 Quarterly
 Monthly

Once signed and coded, please return this agreement to OSP by email (OSP.Reports@la.gov) or mail to Office of State Procurement, P.O. Box 94095, Baton Rouge, LA 70804.

228 219 6839

* 219

Matthew

FY25 DPS Interagency Agreement

Interagency Agreement between the Office of State Police (008-419) and the Louisiana Tax Commission
 (Recipient Agency) (Sending Agency)


For Fiscal Year 2024-2025 (FY25), the Recipient Agency is budgeted and authorized to receive revenue in the amount(s) specified below from the Sending Agency by Interagency Transfer (AT) of funding which has been appropriated to the Sending Agency for such purpose. Additional security adjustments will be agreed upon by the recipient and the sending agencies.

Agency 01-106 Louisiana Tax Commission Facility Capital Annex
 Soft-based Cost \$9,698.00 Security \$7,133.00 DPS Security Total \$16,831.00

Both agencies must submit copies of this agreement with their Budget Request (and any subsequent BA-7's as documentation for AT revenue and AT expense). Please provide and/or attach coding below.


 Recipient Agency Fiscal Officer

8/26/2024
 Date


 Sending Agency Fiscal Officer

8/28/24
 Date

Aggr. Bus. Area	GL	Cost Center	Fund	Grant/WBS	Internal Order	Amount
106	5950001	1061017010	1060000000			\$ 16,831.00
						\$ 16,831.00



Jeff Landry
GOVERNOR

Colonel Robert P. Hodges
DEPUTY SECRETARY

State of Louisiana
Department of Public Safety and Corrections
Public Safety Services

August 26, 2024

To: All Agencies in the Capitol Park/Downtown Development District
From: LTC Gregory Graphia, Deputy Superintendent – Chief Administrative Officer
SUBJECT: CAPITOL SECURITY IAT FOR FY 2024-2025

Enclosed is an Interagency Agreement between the Office of State Police and your agency for Fiscal Year 2024-2025. In accordance with the instructions from the State Budget Office, both the sending and receiving agencies must sign this agreement.

Therefore, please sign the enclosed IAT agreement and complete the Z8 coding information. Please return no later than September 9, 2024, by email at Elizabeth.Boudreaux@la.gov or by mail to:

Department of Public Safety
Office of Management and Finance
Attn: Elizabeth Boudreaux, Budget Services (Box B-1)
P.O. Box 66614
Baton Rouge, LA 70896

Vendor Number – 310087869

Thank you for your cooperation in this matter.

Enclosures

Emailed 8/28/24

COURTESY • LOYALTY • SERVICE
"An Equal Opportunity Employer"
P.O. BOX 66614, BATON ROUGE, LOUISIANA 70896

DPSSP 4117



Fiscal Section

P.O. Box 94111, Capitol Station
Baton Rouge, LA 70804-9111
Valencia Mellion - (225) 342-8081 Fax # (225) 219-0151
Please send questions and coding sheets to scsbilling@la.gov

Billing Date: Tuesday, July 9, 2024

Invoice Number: 250016

GOV-LOUISIANA TAX COMMISSION
Personnel Area: 0106

Amount Due:
\$14,952.00

Payment Due Date
8/6/2024

In accordance with LA R.S. 42:1383 and 42:1262, each agency is required to pay a pro-rata share of the cost of operations of Louisiana State Civil Service. This invoice reflects the amount payable by your agency for the Fiscal Year 2024-2025. The amount due is based on a percentage of total annual salaries of the classified employees in your organization as of December 31, 2023 as reflected in the records reported to Louisiana State Civil Service.

Calculations were made using .00699205 percent of your agency's total annual salaries (\$2,138,463)

Notice: Act 33 of the 2020 Second Extraordinary Session amended and reenacted LA R.S. 42:1383 and repealed LA R.S. 42:1262. As a result, State Civil Service (SCS) and Comprehensive Public Training Program (CPTP) fees are no longer separate. Therefore, invoices will reflect one fee.

Payment in full is due within thirty (30) days from the billing date as reflected above.

LaGov Agencies: Please complete the expenditure coding section below and return this form via email to the SCS Fiscal Section (scsbilling@la.gov) prior to the due date.
NOTE: Effective July 1, 2021 (Fiscal Year 2022), SCS will utilize the Z8 document type in LaGov to process payments for certain customer agencies.
The Z8 document will replace the ISIS AFS J4 and II document process. SCS will be the Seller agency and will initiate the Z8 document in LaGov. As a result, the Buyer agency is required to provide LaGov expenditure coding. When remitting payment, please be sure to provide valid and accurate expenditure coding.
Questions related to this process should be sent to scsbilling@la.gov. Please send all questions prior to the payment due date.
All others: Please make checks payable to Louisiana State Civil Service, reference the invoice number on your check, and remit payment prior to the due date.

The section below should ONLY be completed by LaGOV agencies.
Non-LaGov Agencies: DO NOT complete the coding section below. Please remit payment via check.

Table with 9 columns: BA*, Fund*, Cost Center*, GL*, WBS Element, Grant, Order, Functional Area, Amount*. Handwritten entry: Fund* 1060060000, Cost Center* 1061017010, GL* 5950001, Amount* \$14,952.00. Total: \$14,952.00

* Required Coding

Please re-print this invoice to provide additional coding fields

M.T. Prepared By Date 7/10/24 Approved By Date 7/10/24 Phone # 218-0339

Office of Risk Management
State of Louisiana
Division of Administration

JEFF LANDRY
GOVERNOR



TAYLOR F. BARRAS
COMMISSIONER OF

July 23, 2024

MEMORANDUM

To: Fiscal Officer
From: Office of Risk Management

Re: ORM Monthly Premium Adjustments for FY25 Insurance Premiums

Attached is an invoice for insurance premiums for your agency for FY25 (July 1, 2024 to June 30, 2025). The amount due is shown on the attached invoice.

Please provide the expenditure coding below to be used to process an on-line Z-8 document for the above amount. **The completed form should be signed and returned to ORM via FAX at (225) 342-8473 or by email to Ruby.Scheffler@la.gov.**

If you have any questions, please contact Ruby Scheffler (225) 219-0412, or by email at Ruby.Scheffler@la.gov

Please check which payment option you would like to use.

One-time Payment

Quarterly Payment

Monthly Payment

ORM Agency #: 0425
(on the top left hand of the invoice)

Invoice # 16747

Total Amount: \$ 33,361.00

Business Area	G/L Account	Fund	Cost Center	Order	Amount
<u>106</u>	<u>10600 00000</u>	<u>106</u>			
<u>106</u>	<u>5950017</u>	<u>106 00 00000</u>	<u>1061017010</u>		<u>\$ 33,361.00</u>

Authorized by: [Signature]
Signature

Rajesh Jais
Please Print Name

P. O. Box 91106 + BATON ROUGE, LOUISIANA 70821-9106 + (225) 342-8500 + 1 800 354-9548 + FAX (225) 342-8473
AN EQUAL OPPORTUNITY EMPLOYER

Emiled 7/23/24



STATE OF LOUISIANA
OFFICE OF THE GOVERNOR
DIVISION OF ADMINISTRATION
OFFICE OF RISK MANAGEMENT

AGENCY NO: 0425
Louisiana Tax Commission
Rajesh Jain
1051 North third St.
Baton rouge , LA 70802

INVOICE NO: 16747
INVOICE DATE: 07/01/2024
DESCRIPTION: Annual Premium Invoice
POLICY YEAR: 07/01/2024 - 07/01/2025
ORM ISIS No: 721403316/00
LaGov Vendor No: 310006998

Policy Number	Policy Description	Premium Charge	Safety Penalty/Credit	Premium Balance
ALPD20242025	SELF-INSURED AUTO LIAB & PHYS DAMAGE Auto Liability (3rd Party)	\$196	\$-10	\$186
B1262FI1012724	Cyber Liability Cyber Liability	\$907	\$0	\$907
BP20242025	STATEWIDE SELF-INSURED PROPERTY Property (1st Party)	\$359	\$-18	\$341
BP20242025	STATEWIDE SELF-INSURED PROPERTY PR Property (1st Party) - Disaster Fee	\$180	\$0	\$180
CGL20242025	SELF-INSURED COMMERCIAL GENERAL LIABILITY CGL - General Liability	\$5,775	\$-289	\$5,486
CRIM20242025	SELF INSURED BOND/CRIME Bonds	\$20	\$-1	\$19
STATEWIDEXSPR OP20242025	STATEWIDE EXCESS PROPERTY POLICY Property (1st Party)	\$735	\$0	\$735
WC20242025	SELF-INSURED WORKERS COMP Workers Compensation	\$26,850	\$-1,343	\$25,507
Totals		\$35,022	\$-1,661	\$33,361 Amount Due

Make Check Payable To:
Office of Risk Management
P.O. Box 91106, Capitol Station
Baton Rouge, LA 70821-9106

Direct Inquiries To:
Ruby Dearing
ORM Accounting
(225) 219-0412

Office of Risk Management
State of Louisiana
Division of Administration

JEFF LANDRY
GOVERNOR



TAYLOR F. BARRAS
COMMISSIONER OF

July 23, 2025

To Whom It May Concern:

Attached is a premium adjustment for your agency. **The total amount is due upon receipt, unless other arrangements have been made.**

If your agency is a LaGov agency, please complete the attached Memorandum for payment and return to Ruby Scheffler. ORM will utilize the Z8 document type in LaGov to process payments. You may email or fax your payment documents to the email address or fax number shown below.

If your agency is a non LaGov agency, please issue a check to the Office of Risk Management and mail to the address below.

Your prompt attention to this matter is appreciated. If you have any questions relating to payments, please contact Ruby Scheffler at (225) 219-0412. If you have questions about itemized categories or amounts on the invoice, please contact Kristy Breaux at (225) 342-8598.

Email payment documents to Ruby.Scheffler@la.gov

Fax Payment Documents to Attn: Ruby Scheffler @ (225) 342-8473

Mail:

State of Louisiana
DOA/Office of Risk Management
P. O. Box 91106
Baton Rouge, LA 70821-9106

State of Louisiana Division of Administration
 Office of Finance and Support Services
 PO Box 94095
 Baton Rouge, LA 70804-9095
 (225) 342-0700

INVOICE

DATE: July 28, 2022
 INVOICE #: 23-106
 FOR: FY 22 IAT State Uniform Payroll

Bill To:
 GOV-Louisiana Tax Commission

DESCRIPTION	AMOUNT
Payment Request for Office of State Uniform Payroll Charges for FY23 (07/01/2022 - 06/30/2023) Z8 #8800010164 10600 00000 - GF 1061017710 - Cost Center	1,766.00
TOTAL	\$ 1,766.00

Payment Details

Payment for the services provided to your agency by the Office of State Uniform Payroll is required via a Z8. This invoice serves as support for remitting the funds. Please access the Z8 initiated by our office and enter the expenditure coding and get approvals required to complete the processing of this transaction.

If you have any questions concerning this invoice, please contact Lakeisha Ard at (225) 342-6002 or Lakelsha.Ard@la.gov.

paid 7/31/22 paid

enailed on 7/1/22

Office of Risk Management
State of Louisiana
Division of Administration

JOHN BEL EDWARDS
GOVERNOR

JAY DARDENNE
COMMISSIONER OF ADMINISTRATION



July 1, 2022

MEMORANDUM

To: Fiscal Officer
From: Vickie Aaron, Accountant Administrator
Office of Risk Management
Re: ORM Billing for FY 2023 Insurance Premiums

Attached is the invoice for insurance premiums as provided in the fiscal year 2023 Operating Budget (July 1, 2022 to June 30, 2023) for your agency. The amount due for fiscal year 2023 is shown on the attached invoice.

Please provide the expenditure coding below to be used to process an on-line Z-8 document for the above amount. The completed form should be signed and returned to ORM via FAX at (225) 342-8473 or by email to Ruby.Dearing@la.gov.

If you have any questions, please contact Ruby Dearing (225) 219-0412, or by email at Ruby.Dearing@la.gov

ORM Agency #: 0425 Invoice # 16183 Total Amount: \$ 41,854.00
(on the top left hand of the invoice)

Business Area	G/L Account	Fund	Cost Center	Order	Amount
	<u>1061017010</u>	<u>5950017</u>			
	<u>5950017</u>	<u>10600RY400</u>	<u>1061017010</u>		<u>\$ 41,854.00</u>

Authorized by: *[Signature]* Signature Rajesh Jain Please Print Name

Paid

Office of Risk Management
State of Louisiana
Division of Administration

JOHN BEL EDWARDS
GOVERNOR

JAY DARDENNE
COMMISSIONER OF ADMINISTRATION



July 1, 2022.

To Whom It May Concern:

Attached is your agency's ORM annual insurance premium invoice as provided for in the fiscal year 2023 Operating Budget (July 1, 2022- June 30, 2023). The total amount is due upon receipt, unless other arrangements have been made.

If your agency is a LaGov agency, please complete the attached Memorandum for payment and return to Ruby Dearing. ORM will utilize the Z8 document type in LaGov to process payments. You may email or fax your payment documents to the email address or fax number shown below.

If your agency is a non LaGov agency, please issue a check to the Office of Risk Management and mail to the address below.

Your prompt attention to this matter is appreciated. If you have any questions relating to payments, please contact Ruby Dearing at (225) 219-0412. If you have questions about itemized categories or amounts on the invoice, please contact Kristy Breaux at (225) 342-8598.

Email payment documents to Ruby.Dearing@la.gov
Fax Payment Documents to Attn: Ruby Dearing @ (225) 342-8473

Mail:

State of Louisiana
DOA/Office of Risk Management
P. O. Box 91106
Baton Rouge, LA 70821-9106

P. O. Box 91106 • BATON ROUGE, LOUISIANA 70821-9106 • (225) 342-8500 • 1-800-354-9548 • FAX
(225) 342-8473
AN EQUAL OPPORTUNITY EMPLOYER



STATE OF LOUISIANA
OFFICE OF THE GOVERNOR
DIVISION OF ADMINISTRATION
OFFICE OF RISK MANAGEMENT

AGENCY NO: 0425
Louisiana Tax Commission
Rajesh Jain
1051 North third St.
Baton rouge , LA 70802

INVOICE NO: 16183
INVOICE DATE: 07/01/2022
DESCRIPTION: Annual Premium
POLICY YEAR: 07/01/2022 - 07/01/2023
ORM ISIS No: 721403316/00
LaGov Vendor No: 310006998

Policy Number	Policy Description	Premium Charge	Safety Penalty/Credit	Premium Balance
ALPD20222023	SELF-INSURED AUTO LIAB & PHYS DAMAGE Auto Liability (3rd Party)	\$215	\$-11	\$204
B1262FI1012722	Cyber Liability Cyber Liability	\$1,118	\$0	\$1,118
BP20222023	STATEWIDE SELF-INSURED PROPERTY Property (1st Party)	\$398	\$-20	\$378
BP20222023	STATEWIDE SELF-INSURED PROPERTY PR Property (1st Party) - Disaster Fee	\$142	\$0	\$142
CGL20222023	SELF-INSURED COMMERCIAL GENERAL LIABILITY CGL - General Liability	\$15,841	\$-792	\$15,049
CRIM20222023	SELF INSURED BOND/CRIME Bonds	\$4	\$0	\$4
STATEWIDEXSPR OP20222023	STATEWIDE EXCESS PROPERTY POLICY Property (1st Party)	\$599	\$0	\$599
WC20222023	SELF-INSURED WORKERS COMP Workers Compensation	\$25,642	\$-1,282	\$24,360
Totals		\$43,959	\$-2,105	\$41,854 Amount Due

Make Check Payable To:
Office of Risk Management
P.O. Box 91106, Capitol Station
Baton Rouge, LA 70821-9106

Direct Inquiries To:
Ruby Dearing
ORM Accounting
(225) 219-0412



MICHAEL J. "MIKE" WAGUESPACK, CPA
LOUISIANA LEGISLATIVE AUDITOR

— August 28, 2024 —

Re: Billing Explanation

State Fiscal Officers:

Last fall you were advised of the amount to include in your current year budget (FY25) for the allocation of audit services rendered. The amount allocated to your agency is indicated on the attached invoice. This charge should not be allocated to any federal program. The Division of Administration will provide guidance on how you should charge your federal programs for audit costs.

For non-LAGov users, please submit a check in payment of your allocation by September 28, 2024, to the remittance address on the attached invoice.

For LAGov users, our office has prepared a Z8 for this billing. The Z8 document number is included on the invoice. The Legislative Auditor's agency and vendor numbers are 954 and 310009303, respectively. The Z8 should be appropriately coded, edited, and approved for payment by your office by September 28, 2024.

If you have any Z8 processing questions, please contact Sarah Stevens at (225) 339-3955. For questions concerning the calculation of the allocation, you may contact Beth Davis at (225) 339-3977.

Sincerely,

A handwritten signature in black ink, appearing to read "Mike Waguespack", written over a horizontal line.

Michael J. "Mike" Waguespack, CPA
Legislative Auditor

1600 NORTH 3RD STREET P.O. BOX 94397 BATON ROUGE, LA 70804-9397
PHONE 225-339-3800 | FAX 225-339-3870 | LLA.LA.GOV

\@h

INVOICE Invoice - 15332
Account - 3475
Date - 8/23/24

STATE OF LOUISIANA
LOUISIANA LEGISLATIVE AUDITOR

1600 North Third Street/P.O. Box 94397
Baton Rouge, LA 70804-9397
Tel (225) 339-3800 Fax (225) 339-3988
Web www.lfa.la.gov

PLEASE MAIL REMITTANCE TO:
Legislative Auditor
Attn: Accounting Dept.
P.O. Box 94397
Baton Rouge, LA 70804-9397

Mr. Michael Matherne, Administrator
Louisiana Tax Commission
P.O. Box 66788
Baton Rouge LA 70896

Date	Ty	Document Reference	Due Date	Remark	Amount
08/28/24	AI	000	09/27/24	2024-2025 Allocation	40,200.00
Balance Due					40,200.00

Z8 Document Number: 8800037206

paid 8/29/24

Agency: 106 LOUISIANA TAX COMMISSION	STATE OF LOUISIANA Childrens Budget Department Summary	CHILD - DS Fiscal Year 2025 - 2026 Report Date: 10/30/24
--------------------------------------	---	--

Service Number	Service Name	Agency Number	Agency Name	General Fund	IAT	Self Generated	Stat Deds	Federal Funds	Total Funds	Positions
			Total:	\$0	\$0	\$0	\$0	\$0	\$0	0

Agency: 106 LOUISIANA TAX COMMISSION

STATE OF LOUISIANA
Childrens Budget
by Department

CHILD - DC
Fiscal Year 2025 - 2026
Report Date: 10/30/24

Agency: 106 LOUISIANA TAX COMMISSION

STATE OF LOUISIANA
Childrens Budget
Agency Summary

CHILD - AS
Fiscal Year 2025 - 2026
Report Date: 10/30/24

Service Number	Service Name	Program Number	Program Name	General Fund	IAT	Self Generated	Stat Deds	Federal Funds	Total Funds	Positions
			Total:	\$0	\$0	\$0	\$0	\$0	\$0	0

Agency: 106 LOUISIANA TAX COMMISSION

STATE OF LOUISIANA
Childrens Budget
by Agency

CHILD - AC
Fiscal Year 2025 - 2026
Report Date: 10/30/24

Agency: 106 LOUISIANA TAX COMMISSION

**STATE OF LOUISIANA
Childrens Budget
by Agency/Program and Service**

**CHILD1
Fiscal Year 2025 - 2026
Report Date: 10/30/24**

Agency: 106 LOUISIANA TAX COMMISSION	STATE OF LOUISIANA Childrens Budget Narrative	CHILD2 Fiscal Year 2025 - 2026 Report Date: 10/30/24
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Form ID:	
Form Description:	
Service:	

Question and Narrative Response

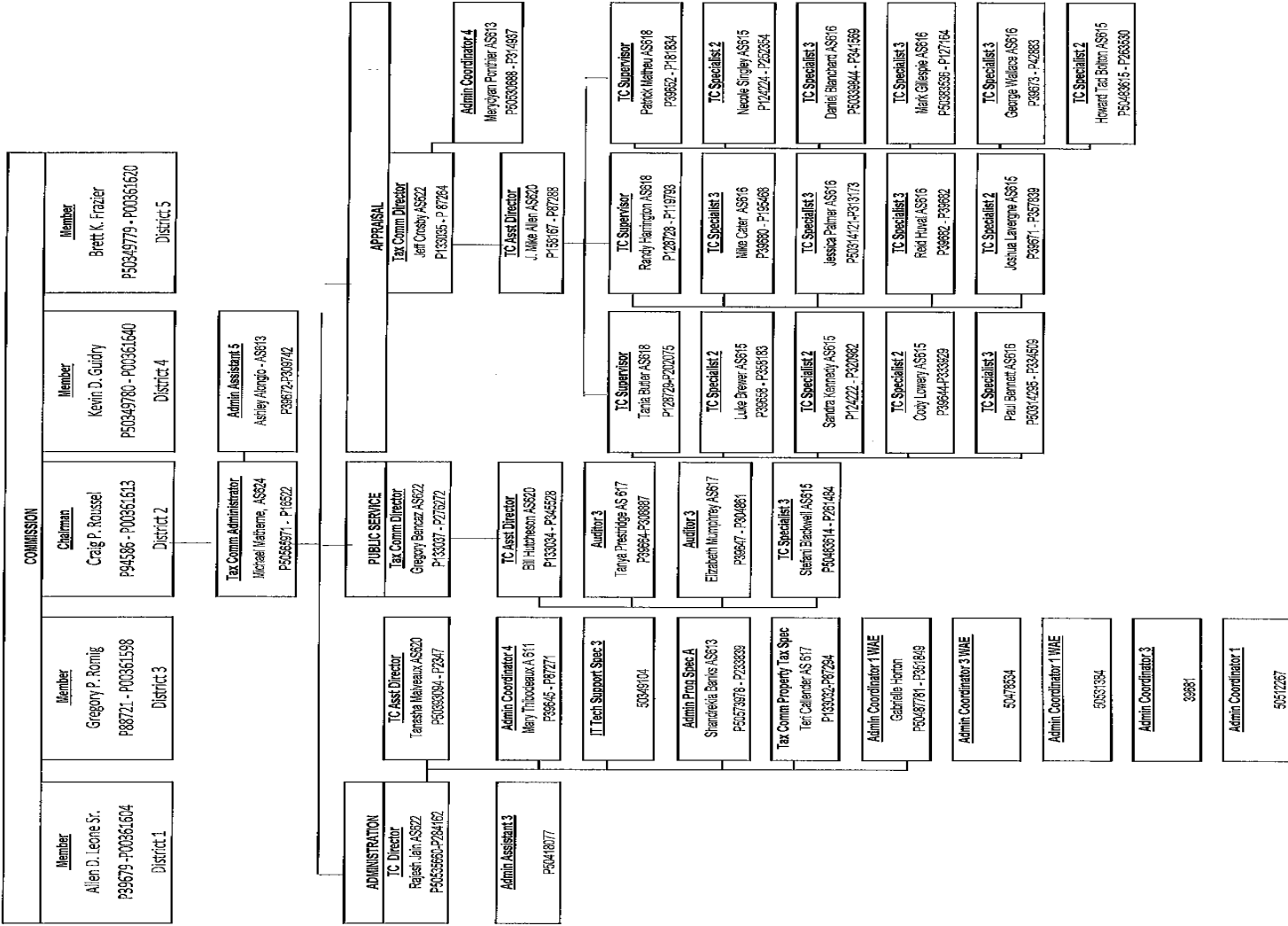
Agency: 106 LOUISIANA TAX COMMISSION

STATE OF LOUISIANA
Sunset Review

SUNSET1
Fiscal Year 2025 - 2026
Report Date: 10/30/24

GENERAL ADDENDA

Organizational Chart





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