



End-to-End Homestead Administration™

The first administration solution for managing the entire homestead eligibility lifecycle, from approval to removal.

Government funding that supports essential public services such as schools, fire departments, and infrastructure is managed and collected by assessing officials. But recently, the demands on those professionals have grown complex and data intensive. Worse yet, the resources that help assessors meet those demands have not kept pace. This gap has real consequences, as assessors find themselves unable to adequately keep up with funding functions — like homestead eligibility administration, for instance. The final outcome? Financial loss that negatively impacts citizen services.

The Dynamic Nature of Homestead Eligibility

An important role of an assessor is to produce accurate taxable values. To do that, they need to review the eligibility of new homestead applications and keep track of homestead's eligibility even after it has been granted. It's a never-ending job. The eligibility of a new homestead can be established at a point in time, but the applicant's continued eligibility throughout the course of their ownership can change based on events such as acquiring second homesteads, changing residency, and passing away. Unfortunately, not all citizens are proactive in reporting their eligibility updates to assessing offices, so it's important for assessors to keep tabs on eligibility themselves.



Owners of homesteaded properties get married, buy second homes, move away, rent their properties, and change residency on a daily basis in every county. The only sustainable method for maintaining the accuracy of a homestead is to observe its eligibility through its entire lifecycle.

Tyler Masterson,
CEO & Co-Founder of TrueRoll

The Current Approach to Homestead Eligibility Monitoring

The current approach to homestead eligibility monitoring is a direct result of resource lack.

Homestead administration teams are usually small — typically ranging from one part-time individual to twenty+ full-time staff members for the largest counties. The teams usually have many responsibilities: customer service, processing new applications, verifying eligibility, and removing exemptions when homesteads are no longer eligible.

All of these offices are doing their best given their resource constraints.

But every jurisdiction TrueRoll has worked with has discovered hundreds — even thousands and tens-of-thousands — of unqualified homesteads receiving benefits they weren't eligible to receive.

It's true that most of the homestead administration effort is currently spent on enrollment: manually helping citizens complete applications and reviewing the eligibility of new applications by calling the counties of previously held homesteads and manually searching voter/drivers license (DL) records. But it's only necessary that all this time go into initial eligibility verification because it's rare that offices will have time to review granted homesteads for ongoing eligibility ever again.

On the off chance assessing offices do have time to review granted homesteads, their reviews are usually limited to checking returned mail, investigating complaints from disgruntled neighbors, and reading the obituaries. It's a labor-intensive process that's prone to red herrings and observation biases. Basically, fraud is only found where you have the time to look for it.



HOW MUCH TIME WOULD YOUR TEAM SAVE IF:

- You never received an incomplete homestead application?
- You could bulk approve 80% of new homestead applications and spend time on the remaining 20%?
- You never had to deal with homestead application backlogs?
- You were proactively notified of all eligibility changes automatically?
- You could easily remove ineligible homesteads via efficient workflow management?

A New Approach to Homestead Eligibility Monitoring

One way assessing professionals have mitigated the homestead eligibility challenge is through innovative partnerships that help them manage the full homestead lifecycle. TrueRoll's new **End-to-End Homestead Administration™** solution was introduced to help safeguard the jurisdiction's important funding sources and precious office staff time. It does so by enabling assessing teams to easily manage homestead eligibility from approval to removal.

By onboarding this new capability, the most progressive assessing offices across the country are solving the core homestead eligibility challenge for good. TrueRoll allows them to meet the increasing demands of their office and achieve their taxation accuracy, staffing efficiency, and compliance goals.

End-to-End Homestead Administration™ helps your team manage the entire homestead lifecycle for:



NEW HOMESTEAD APPLICATIONS



EXISTING HOMESTEADS



UNCLAIMED HOMESTEADS

TrueRoll's End-to-End Homestead Administration™ Solution

Addresses the homestead eligibility challenge by streamlining every step.

KEY CAPABILITIES INCLUDE:



Full Lifecycle Management: Covers the entire homestead eligibility review process from approval to removal; i.e. new applications through eligibility changes and removals.



Real-Time Eligibility Recommendations & Notifications: Provides automated eligibility recommendations for new applications and eligibility-change notifications for existing homesteads, so your team can make informed decisions quickly and in bulk.



User-Friendly Web-Based Workflow: TrueRoll was built to follow the intake, approval, and removal process. Our workflow features include assignment, full audit history, and financial impact reporting for your team.



Expert Investigator Staff (Optional): TrueRoll's team of trained investigators can help your team discover unqualified homesteads using the End-to-End Homestead Administration™ platform, and deliver the evidence and recommendations directly to your staff.



Automation and Integration: Automates repetitive manual tasks by integrating with existing property assessment systems.

Solution Components:

- Online or Handwritten/Paper Form Scanning & Processing
- Thousands of National Data Sources: Voter, DL, Rental, Moves, Vacancies, Deeds, Obituaries, etc.
- Automated Eligibility Detection & Recommendation
- Eligibility Change Notifications
- Online Workflow & Tracking
- Interoperable with All CAMAs

HOW IT WORKS

TrueRoll's solution is web-based and built for managing the full lifecycle of homesteads. Key functionalities for new applications and homestead eligibility changes include:

The Homestead Lifecycle, Powered by TrueRoll

New Homestead Applications

1. **Intake:** via paper or TrueRoll/Integrated-CAMA online form
2. **Digitization:** including handwritten paper application
3. **Automated Eligibility Recommendations:** "Approve" or "Inquire" recommendations based on 100s of authoritative and government issued data sources and configurable business rules
4. **Workflow:** bulk approval, citizen inquiry, note taking, etc.
5. **CAMA Integration:** granted homesteads migrated directly to CAMA

Homestead Eligibility Changes

1. **Discovery:** proactive identification and notification of moves, DL changes, voter registrations, rentals, duplicate homesteads, deaths, etc.
2. **Prioritization:** sorts your homesteads by likelihood of ineligibility so you can focus on the highest-risk cases
3. **Investigation:** your team (or our investigation staff) performs eligibility investigations
4. **Evidence:** all evidence presented on a single screen to facilitate a removal decision
5. **Workflow:** homestead removal workflow support (mailings) and audit trail
6. **CAMA Tax Roll Updates:** properties change hands, TrueRoll automatically updates

Benefits for Assessing Officials

COST SAVINGS + GUARANTEED ROI

End-to-End Homestead Administration™ has generated significant cost savings and new revenue by reducing manual labor and minimizing revenue-costing errors. These savings are guaranteed in your contract with TrueRoll and can be easily demonstrated to your budget holders upon renewal.

PROTECTED STAFF TIME

Imagine being able to offload repetitive tasks to TrueRoll so your team can focus on the tasks they excel at. TrueRoll's solution significantly enhances your team's efficiency by automating routine tasks like cross-checking state and county databases for eligibility. This allows you to process applications faster and with greater accuracy, plus to identify eligibility changes automatically.

IMPROVED HOMESTEAD ACCURACY

Harness the power of automation. Configured to your office's specific business processes, our automated solution minimizes human error in data entry and verification. Plus, TrueRoll's configurability and integration with your existing systems ensures consistent and up-to-date data, reducing discrepancies and enhancing the accuracy of homesteads.

ENHANCED TRANSPARENCY AND ACCOUNTABILITY

Real-time data and analytics provide a transparent view of the homestead administration process. Your team can track application statuses, monitor performance metrics and ROI, and proactively address issues, fostering accountability and trust among citizens and county boards.

BETTER CITIZEN SERVICE

By automating processes and resolving application backlogs, citizens will get faster approval decisions. Additionally, TrueRoll's "unclaimed" homestead capability can identify eligible owners who are not receiving homesteads.



We need a wide net of information via a data mining resource. This will really enhance our time spent on our investigative process and improve accuracy.

Al Dams,
Deputy Appraiser, King County WA

Case Study: Successful Implementations

**TRUEROLL GUARANTEES A 100% RETURN ON INVESTMENT (ROI) IN ITS CONTRACTS.
SOME CLIENTS EXPERIENCE OVER 500% ROI!**

Successful implementations include:*

- **Sarasota County, FL** was losing revenue due to the limited investigation time of their three homestead staff members. After implementing TrueRoll, Sarasota experienced dramatic increases in unqualified homestead discovery and saved thousands of hours by having TrueRoll perform the resulting investigation work. This yielded hundreds of millions of dollars in new assessed value and millions of dollars of new revenue.
- **Williamson County, TX** manages nearly 150,000 homesteads. They employed TrueRoll's end-to-end solution to administer their entire homestead lifecycle from TX FORM 50-114 application intake to an automated bulk homestead denial process.
- **Lake County, IL** enlisted the help of TrueRoll to empower its 15+ township assessors to remove over a thousand unqualified homesteads in their jurisdiction, creating vast improvements in time savings and taxation equity.
- **St. Johns County, FL** has returned millions to the county over the years by identifying disqualifying events proactively and using TrueRoll to manage their questionnaire/denial mailing processes on a quarterly basis.

All of the above customers have used TrueRoll to administer their homestead eligibility for multiple years.

TrueRoll's End-to-End Homestead Administration solution automates and streamlines the homestead eligibility process by providing assessing professionals with the tools needed to perform their duties more effectively. The solution's comprehensive features and proven benefits make it an invaluable asset for any assessing offices looking to enhance efficiency, accuracy, and revenue retention in homestead administration.



TrueRoll Who Is TrueRoll?

TrueRoll is a four-time GovTech Top 100 company, awarded to organizations recognized for making a significant impact in government technology. As the industry leader in homestead administration, we proudly serve over 100 of the most progressive counties, both large and small, and monitor more than 10 million homesteads nationwide. Our efforts have helped counties recover hundreds of millions in new assessed value. Founded in 2018, TrueRoll focuses exclusively on using authoritative data sources, a web based platform, and automation to modernize the entire lifecycle of homestead administration for our government assessing partners. Our customers use TrueRoll solutions in order to increase revenue, save staff time, and improve taxation equity.

Are you ready to return missing funds to your jurisdiction and elevate your team by automating manual processes? Discover how TrueRoll's End-to-End Homestead Administration™ solution can transform your office. [Contact us](#) today to learn more and schedule a demonstration. Together, we can create a more efficient and accurate future for homestead administration.