# City of Santa Barbara Business Tax Certificate Online Filing Instructions





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This guide is to assist City of Santa Barbara taxpayers on how to apply and receive the City's Business Tax Certificate using our online portal. Please note that different business structures may have different requirements and filing steps. <u>Frequently Asked Questions and answers start on page 14.</u> **The Business Tax Certificate will take approximately 4-8 weeks for you to receive the certificate in the mail.** 

**Step 1:** Go to <u>SantaBarbara.BizLicenseOnline.com</u>. Click *Sign Up*. If you have already created an online account, enter the username and password you created, then go to step 9.



**Business Certificate/License Questions** 

Santa Barbara (877) 779-7222 SantaBarbaraSupport@avenuinsights.com Website Support (877) 693-4435 support@bizlicenseonline.co

Privacy Statement, | Terms and Rules Powered by Avenu Insights & Analytics, LLC - © 1999-2024 - All Rights Reserved **Step 2:** Select *Business Account*. Every business account, identified by its unique account number, must complete this step.

Business Account
For business owners or companies who need to file for a single business or a single business which can have multiple locations. Business Account

**Step 3:** Enter your contact details and create your new username and password. The password cannot contain special characters or symbols.

Online Security Corporate/Busine Registration Question/Answer Account Setup Information	ss Owner Additional Municipality/Return Information Information Setup Review
User Information	Login Information
This information refers to the person responsible for creating this account and/or filing of returns.	Please write down and store in a secure place.
First Name *	Usemame*
Last Name*	Password *
Title*	Re-enter Password*
Phone Number*	
Fax Number	
Email Address *	
Re-enter Email Address*	
	Save and Con

**Step 4:** Create a secret question and answer. You do not have to use one of the questions in the list. You can type in any question and answer.

ou forget your password or must reset an expired e are a few suggestions for the security question	f password, you will b 1:	e asked the security q	uestion below and mu	ist provide the answer.	
What is the first and last name of your first boyfri	end or girlfriend?				
Which phone number do you remember most fro	m your childhood?				
What was your favorite place to visit as a child?					
Who is your favorite actor, musician, or artist?					
What is your favorite hobby?					
ecret Question*					
ecret Answer *					
0 Characters Max)					

**Step 5:** Select either New or Renewing Business. All renewals should select *Renewal and Existing License/Account*.



**Step 6**: New Businesses will have extra steps to create their account. Select the drop-down menus under each required selection. Select the state as California, and the Municipality as Santa Barbara, CA. Complete all required fields with red asterisks. Skip steps 7-8 and continue to step 9.

#### Account Setup

New Business in Municipality / New Owner / New FEI	N
If you are a new business or a new owner of an existing b business certificate application.	usiness, please se
Select State(s)	
Select the states that you will be filing in (select all that a	apply).*
Nothing selected	*

**Step 7:** Renewing accounts should select the second option as a renewal. It will prompt to enter the account number and business name exactly as it is listed on your renewal notice or previous tax certificate. Do not include special characters, symbols, or punctuation marks.



**Step 8:** If the entered business information is correct, a green message will show up, then click *Import and continue*.



**Step 9:** When you log in, or complete the new business setup, you will be directed to the home page. You can navigate your filings from here. To begin the tax payment process, click *File Application/Return*.

Applications/Returns Applications/Returns Account Center File Application/Return Municipality/Return Setup Filing History Payment Accounts Payment Accounts	Applications/Returns          Image: Price Application/Return       Account Center         Image: Price Application/Return       Image: Price Application/Return         Image: Price Application/Return       Image: Price Application         Image: Price Application       Image: Price Application	Applications/Returns          Applications/Returns       Account Center         File Application/Return       Corporate/Business Information         Municipality/Return Setup       Corporate/Business Information         Filing History       Change assword         Payment Accounts       Security Duestion and Answer
Applications/Returns       Account Center         Image: File Application/Return       Image: Corporate/Business Information         Image: Municipality/Return Setup       Image: User Information         Image: Filing History       Image: Corporate/Susiness word         Image: Payment Accounts       Image: Corporate/Susiness Information	Applications/Returns       Account Center         Image: File Application/Return       Image: Corporate/Business Information         Image: Municipality/Return Setup       Image: Corporate/Business Information         Image: File Application/Return       Image: Corporate/Business Information         Image: File Application/Return       Image: Corporate/Business Information         Image: File Application/Return       Image: Corporate/Business Information         Image: File Application       Image: Corporate/Business         Image: File Applic	Applications/Returns       Account Center         Image: State of the
File Application/Return     Corporate/Business Information <ul> <li>Municipality/Return Setup</li> <li>User Information</li> <li>Filing History</li> <li>Payment Accounts</li> <li>Security Duestion and Answer</li> </ul> <li> <ul> <li>File Payment Accounts</li> </ul></li>	File Application/Return     Image: Corporate/Business Information       Image: Municipality/Return Setup     Image: User Information       Image: Trilling History     Image: Change:	File Application/Return       Image: Corporate/Business Information         Image: Municipality/Return Setup       Image: Corporate/Business Information         Image: Payment Accounts       Image: Corporate/Business Information         Image: Payment Accounts       Image: Corporate/Business Information         Image: Document Center       Image: Corporate/Business Information
Municipality/Return Setup     Wuser Information     Security Question and Answer	Image: Municipality/Return Setup     Image: Descent setup       Image: Descent setup     Image: Descent setup	
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Payment Accounts	Payment Accounts      Pocument Center	Payment Accounts     Pourment Center
	Document Center	Document Center
Document Center	n - Chen Ball Wolfschen Kann	

\*If any of your business information has changed, including change of physical or mailing address, business structure, or business name, edit the information by clicking *Corporate/Business Information* prior to filing a return.

**Step 10:** Questions 1-4 are preselected – do not change them. Start with question 5 and answer honestly through question 8. For renewals only, question 8 is preselected, so click *Next* to proceed.

## File Application/Return

Select the state, municipality/return, filing period and business location you would like to file. Click Next to proceed.

1. Select a State*	
California	~
Is your state not listed? Click here to add the municip	ality/return.
2. Select a Municipality*	
Santa Barbara Business License	~
Is your municipality/return not listed? Click here to ad	ld the municipality/return
3. Select a Filing Period *	
Annual - 2024	~
4. Select a business location.*	
CITY HALL	~

5. Is this a New Business not previously registered with the City of Santa Barbara?\*

🔾 Yes 🔍 No

6. Has this physical location changed since your last business license issued by the City of Santa Barbara?\*

🔾 Yes 🖲 No

7. Has the ownership or FEIN of your business changed since your last filing with the City of Santa Barbara?\*

- 🔾 Yes 🔍 No
- 8. Filing type\*
- New Business Renewal



\*If you have already updated your business information, or have renewed online in previous years, steps 11-16 may not be required. You can continue to step 17.

**Step 11:** Review *location information*. Scroll down and verify information. Only complete missing fields that have asterisks.



**Step 12:** If required, Partner Information needs to be completed with the owner of the business. Only complete missing fields that have asterisks.



#### Step 13: Copy the Location Name to the Trade Name if they are blank.

Location Information

**Step 14:** Enter the 4 digit SIC Code. If you do not know your SIC code, click the "Click Here" link and search for the 4-digit code that most closely corresponds to your business type.

Sic Code * ⑦ Click He	re

**Step 15:** Click on the box that checks the physical and mailing address are the same as the corporate address. The corporate address is what we currently have on file. If you need to update your physical or mailing address, see Step 9.

Physical Address

Same as Corporate/Business Address?

**Step 16:** Select if the physical address is a residential *or* is not a residential address. Click *Save*. The page will refresh and should create a *Next* button; click this button to continue.

Is This Address Residential?*
<ul> <li>The business location or job site address provided IS NOT a residential address.</li> </ul>
<ul> <li>The business location or job site address IS A RESIDENTIAL ADDRESS.</li> </ul>
Save

**Step 17:** A pop-up will occur with additional business information with links to other agencies. Read through and click *Acknowledge*.



\*All acknowledgements can be accepted to continue. Additional documentation may be required for new applicants *only* (there will be an upload section if documentation is required). Renewal accounts do not need to provide additional documentation.

**Step 18:** Answer the following questions. Please answer questions 3-4 based on the physical location of the business. The answers provided will dictate the business types shown in Step 19.

Santa Barbara Business	s Licens	se	
Renewal License Only			
Filing Period Annual - 2024	File Date	01/21/2024	
This application/return will not be filed until the file When payment is made with a bank account, payment will not b When payment is made with a credit card, the file date mu	e date specified. e processed until st be set to today?	the file date. s date.	
Step 1 - Select the date this business started within Santa Barbara OR change	ged location /	FEIN.	
=			
Step 2 - Is this business involved in the Cannabis Industry? • Yes  • No			
Step 3 - Is this a Home-Based Business?			
○ Yes ○ No			
Step 4 - Is this business physically located within the City of Santa Barbara?			
○ Yes ○ No			

**Step 19:** Add the business description from the drop-down menu exactly as it is listed on your renewal notice or previous tax certificate.



**Step 20:** The business type adds to the bottom of the page. Scroll down and enter either units <u>or</u> gross receipts.

"Units" means number of people for most business types.

<u>"Gross Receipts</u>" is the amount you charged your customers in the previous calendar year.

The tax automatically calculates.

Application/Return Setup

Hover over a table field to view additional details.						
License Type	Unit(s)	Penalty	Total Fee	Credit	Net Due	
PROFESSIONAL SERVICES (199-00)	2	\$0.00	\$200.00		\$200.00	0
STATE DISABILITY ACCESS FEE AB 1379 (10-00)		\$0.00	\$4.00		\$4.00	

**Step 21:** Review the application/return information by ensuring you selected the correct business description and schedule code.

Review Application/Return Information

BACK button to make e	aits. It everything is correct, click <b>NEXT</b> to continue. After your return is submitted, re	visions could require a paper amended return.
Municipality	License Type	Total Due
Santa Barbara	PROFESSIONAL SERVICES (199-00)	\$200.00
Santa Barbara	STATE DISABILITY ACCESS FEE AB 1379 (10-00)	\$4.00
ISSUANCE FEE		\$0.00 \$204.00

**Step 22:** Choose your payment method and enter the information. You can use the routing and account number from a bank account, or the card information on any Mastercard, Visa, or Discover card. There is no processing fee to pay from a bank account (the first option).



**Step 23:** Review all the information on your account for accuracy. Click Submit to complete your filing.



**Step 24:** The page should now say your *application/return successfully filed*. Print the confirmation page by selecting *Print/View*. <u>You can use this</u> as a temporary business tax certificate until you receive yours in the mail. You do not need to send this confirmation to anyone.



### Frequently Asked Questions:

#### How long is this business tax certificate good for?

All business tax certificates expire December 31<sup>st</sup> of each year, regardless of when a return or application is filed.

#### How long will it take to receive the tax certificate in the mail?

It takes approximately 4 to 8 weeks to process. A paper copy of the business tax certificate will be mailed to your mailing address on file.

#### How will I get my tax certificate?

The business tax certificate will be printed and mailed. You can email <u>SantaBarbaraSupport@AvenuInsights.com</u> and request an emailed pdf copy.

#### Who should I contact if I don't receive the tax certificate?

Contact Avenu Insights & Analytics at their toll-free phone (877) 779-7222 or email <u>SantaBarbaraSupport@AvenuInsights.com</u>.

#### What do I do if I get stuck on the webpage?

Attempt to click the *Home* button. If this works, click *File Application/Return* and continue to file your tax return. If this does not work, contact Avenu at (877) 779-7222 or email <u>SantaBarbaraSupport@AvenuInsights.com</u>.

## Frequently Asked Questions (cont.):

#### I called and no one answered.

Call (877)779-7222 and listen to the entire message before selecting an option. Once the message is complete, select 1. Wait approximately three minutes, and the recording will ask to make a selection – select 1 to continue to a representative (it will take more than 30 minutes due to call volume), select 2 to leave a phone number for them to call back (you will receive a call back within 24 hours).

#### I emailed them and it bounced back.

Ensure the email is spelled correctly. Avenu does not have an "E" at the end of the word. Also check that all words are included in the email <u>SantaBarbaraSupport@AvenuInsights.com</u>.

#### How can I update my address?

You can update your physical and mailing address at any time, including before or after you have completed your filing, by logging in to your account and updating the information listed on your contact information page. See Step 9 of the instructions.

#### What do I do if I changed from a sole proprietor to an LLC/Corporation?

If the owner of the business remains the same, and no additional partners are acquired, you can update this information by logging into your Avenu account and clicking on *Corporate/Business Information*.

#### Do I need to file a new application if the ownership has changed?

Yes, a change in ownership or tax I.D. requires the current account to be closed and a new account be filed.

## Frequently Asked Questions (cont.):

#### Do I need to file the business tax if I work from home?

Yes. Businesses operating from the home also require payment of a business tax. The City's Zoning Ordinance regulates the type of business operations that may be done in the home.

#### What is a Practitioner Account and how do I set one up?

A practitioner account is for tax preparers, CPAs, and filing practitioners who manage multiple business accounts for multiple clients. Follow Steps 1-4 of the filing guide. If you file multiple business accounts for multiple clients, each business account will need to have its own username and password created. Then, the business accounts can be linked to the practitioner account.

#### What do I do if I forgot my username or password?

Go to the website <u>SantaBarbara.BizLicenseOnline.com</u> and click on *Forgot Username* or *Forgot Password*. You will be prompted to enter the email you initially signed up with. If your email cannot be found, you can contact Avenu to assist with the retrieval process, or you can Sign Up again and create a new log in.

#### What happens if the screen has a Time Out error?

Call (877)779-7222 and ask a representative to reset your password. You must give them your existing username and password. The time out error is most likely due to creating a password with special characters (special characters are not allowed in the password and will create system errors).

#### What do I do if the confirmation page does not pop up?

This error is most likely due to your browser not allowing pop-up pages. This error occurs most often on phones. Try using a desktop or laptop computer, or change your browser settings. If you cannot troubleshoot this error, call (877)779-7222 or email

SantaBarbaraSupport@AvenuInsights.com.

#### How do I close my account?

Email Avenu at <u>SantaBarbaraSupport@AvenuInsights.com</u> with the closure date of your business and reason for closure. Your account will not be closed due to a lack of response or payment. All business taxes and assessments are due up to the date of closure.

The online filing video guide can be found by visiting <u>https://SantaBarbaraCA.gov</u> and click Business > Business Taxes & Assessments > Business Tax Certificate Information

## City of Santa Barbara Business Tax Support

Toll Free Phone: (877 )779-7222 Hablamos español Email: <u>SantaBarbaraSupport@AvenuInsights.com</u>

Website Support Phone: (877) 693-4435 Website Support Email: <u>Support@BizLicenseOnline.com</u>

Online Application Website: https://SantaBarbara.BizLicenseOnline.com

#### **Personal Information:**

Username:
Password:
Security Question/Answer:
Email:
Phone Number:
Avenu Account Number:
Avenu Pin Number:
Schedule Number:
Schedule Name

SIC Code (four digits):

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