

# TCAD UPDATES FOR TAX AGENTS

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**2021 Protest Season**



**TRAVIS CENTRAL**  
APPRAISAL DISTRICT

# HAVE QUESTIONS?



Use the Q&A feature to submit your question.



# IMPORTANT INFORMATION

[www.traviscad.org/reports-request/](http://www.traviscad.org/reports-request/)

## REPORTS & REQUEST

PUBLICLY AVAILABLE DATA

APPRAISAL REPORTS

### AGENT DOCUMENTS

AGENT PORTAL TUTORIAL

APPOINTMENT OF AGENT PORTAL INSTRUCTIONS

4147F JOINT MOTION AFFIDAVIT REQUEST



# IMPORTANT INFORMATION

## Mailing address

- **PO Box 149012, Austin TX 78714**
- **850 East Anderson Lane, Austin TX 78752**



# IMPORTANT DATES

Notices of Appraised Value	April 16,2021
Protest Deadline	May 17, 2021
Informal Meetings	
Residential	April 19, 2021 to June 18, 2021
Commercial	April 26, 2021 to June 18, 2021
Formal Hearings	June 1, 2021 to August 30, 2021



# APPOINTMENT OF AGENT PORTAL

**\*\*New for 2021\*\***

<https://agent.justappraised.com>

Easy as 1-2-3

1. Select appointment or revocation
2. Select your agent code
3. Upload up to 100 PDF appointment forms at a time

*An exhibit may be used as a third page in a PDF to list multiple associated parcels.*

Uploads are reviewed and updated daily.

They are visible on the agent portal the next day.



# APPOINTMENT OF AGENT PORTAL

1. <https://agent.justappraised.com>

STEP 1

## Form Upload Type

Are you uploading an Appointment of Agent or Revocation?

Select an option ×

- Appointment of Agent
- Revocation of Agent



# APPOINTMENT OF AGENT PORTAL

## 2. <https://agent.justappraised.com>

STEP 2

### Agent ID search

Agent Name	Agent Address	Zip
<input type="text" value="Agent 7"/>	<input type="text"/>	<input type="text" value="787"/>

Agent Search Results

<input checked="" type="checkbox"/>	1752363	8314 CROSS PARK DR
	Agent Name	AGENT 7
	Agent Address	
<input type="checkbox"/>	2102	
	Agent Name	JOHN C BLAZIER AGENT
	Agent Address	BLAZIER CHRISTENSEN BIGELOW & VIRR 901 S MO PAC EXPY STE 200





# APPOINTMENT OF AGENT PORTAL

## 3. <https://agent.justappraised.com>

STEP 3

### File Uploads

Only PDF files are accepted

FILE	STATUS	
Sample AOA file (PDF).pdf	UPLOADING	×

Click to Upload Files

Your progress is saved when you continue.

[Back](#) [Continue](#)



# APPOINTMENT OF AGENT PORTAL

<https://agent.justappraised.com>



## Appointment of Agent Form

Appointment of Agent or Revocation

[Start New Application](#)

### Previous Applications

March 30, 2021

Agent ID: 7

APPOINTMENT OF AGENT

[View Submission >](#)

March 23, 2021

Agent ID: 1398

APPOINTMENT OF AGENT

[View Submission >](#)



# AGENT PORTAL – EFILE

Go Live – **April 12, 2021**

- eFile protests
- View and upload evidence
- Accept or reject informal settlement offers\*
  
- <https://www.traviscad.org/reports-request/>



# AGENT PORTAL – EFILE

Go Live – **April 12, 2021**

- eFile protests
- View and upload evidence
- Accept or reject informal settlement offers\*
  
- Agent Portal tutorial available online at
  - <https://www.traviscad.org/reports-request/>



# AGENT PORTAL – EFILE

eFile protests are **required** if you would like:

- Informal Meetings
- 41.47 Joint Motions (Topline)



# AGENT PORTAL – EFILE

eFile - Same Day Formal Hearing requests:

- Email Excel spreadsheet of PID numbers to [agentportal@tcadcentral.org](mailto:agentportal@tcadcentral.org)
- To expedite processing use “**Same Day**” in the subject line.
- **Deadline May 17, 2021**



# AGENT PORTAL – EFILE

Questions regarding eFile and Agent Portal should be directed to

[agentportal@tcadcentral.org](mailto:agentportal@tcadcentral.org)



# INFORMAL MEETINGS

Timeline: Residential

April 19, 2021 - June 18, 2021  
Monday through Friday  
7:45 AM to 4:45 PM





# INFORMAL MEETINGS

Timeline: [Commercial](#)

April 26, 2021 - June 18, 2021  
Tuesdays and Thursdays (agents)  
Wednesdays (owners)  
9:00 AM to 1:00 PM



# INFORMAL MEETINGS

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Travis CAD reserves the right to modify or suspend informal meetings based on conflicts with formal hearing schedule, availability of resources, efficiency, or if there is insufficient demand.



# INFORMAL MEETINGS

## Scheduling

To schedule an informal meeting the agents must have:

- eFile protested using the agent portal
- have a valid appointment of agent, **and**
- submit evidence using the agent portal
- *If these requirements are not satisfied timely, the reservation may be rejected.*

Only one informal meeting will be permitted per property.



# INFORMAL MEETINGS

## Scheduling

Informal meetings will not be scheduled by TCAD and will be held on a first come, first serve basis.

### Get In Line Online

- TCAD will utilize the QLess reservation system.
- <https://www.traviscad.org/getinlineonline>



# INFORMAL MEETINGS

## Scheduling

Get In Line Online - <https://www.traviscad.org/getinlineonline>

- Name
- Phone Number (this is the number we will call)
- Portfolio
  - Separate appointments are needed to meet with appraisers in different portfolio



# INFORMAL MEETINGS

## Scheduling

Get In Line Online - <https://www.traviscad.org/getinlineonline>

- Date
  - Get in line same day, or
  - Reserve a time in the future
    - *Scheduled appointment times have first priority.*



# INFORMAL MEETINGS

## Scheduling

Get In Line Online - <https://www.traviscad.org/getinlineonline>

- Future Date Reservations
  - Schedule individual time slot (10-15 minutes)
  - 1 hour block - **Commercial** OR
  - 4 hour block – **Residential**
    - a minimum of 25 accounts to be worked



# INFORMAL MEETINGS

## Scheduling

Get In Line Online - <https://www.traviscad.org/getinlineonline>

- No shows at scheduled informal meetings may result in rejection of future schedule requests.
- Abuse of the reservation system/wasting resources may result in rejection of future schedule requests.





# INFORMAL MEETINGS

## Scheduling

Get In Line Online - <https://www.traviscad.org/getinlineonline>

- Future timeslots will be added on a rolling basis, dependent on staff availability.
- Multiple appointments will be limited to provide everyone an equal opportunity to schedule informal meetings.



# INFORMAL MEETINGS

## Scheduling

Get In Line Online - <https://www.traviscad.org/getinlineonline>

- April 12, 2021
- Do not delay!



# INFORMAL MEETINGS

## Logistics

- Meetings will be held telephonically with online remote screen share.
- If the number you provided accepts text messages, you will receive text alerts before you are called.
- At your scheduled time, an appraiser will call you at the number provided in your reservation.



# INFORMAL MEETINGS

## Logistics

At the beginning of the call, the appraiser will give the agent the Sonexis information if they would like to screen share evidence.



# INFORMAL MEETINGS

## Offers

- An informal meeting offer that reduces value is NOT guaranteed.
- All offers will be based solely on documented evidence.
- All evidence you would like considered at informal must be submitted via the agent portal.



# INFORMAL MEETINGS

## Offers

- Appraisers will discuss potential offers over the phone during an informal meeting.
- Offers will be officially made via agent portal, generally overnight or next day.
  - Lack of uploaded evidence will delay offers.
  - Some offers may require a 41.47 Joint Motion.
- Agents must formally accept the offer in the agent portal.



# INFORMAL MEETINGS

## Offers

TCAD management reserves the right to review all offers for typographical errors, accuracy, fairness, and consistency.



# 41.47 JOINT MOTIONS (TOPLINE)

## Timeline

- 41.47 Joint Motions will be offered to agents who eFile protests via the Agent portal.
- April 19, 2021 to August 20, 2021





# 41.47 JOINT MOTIONS (TOPLINE)

## Procedures

- Requests for 41.47 Joint Motion should be submitted using the Travis CAD Form 4147F and be emailed to:
  - [Residentialappeals@tcadcentral.org](mailto:Residentialappeals@tcadcentral.org)
  - [Commercialappeals@tcadcentral.org](mailto:Commercialappeals@tcadcentral.org)
- To expedite processing please use “Joint Motion” in the subject line of the email.



# 41.47 JOINT MOTIONS (TOPLINE)



## TRAVIS CENTRAL APPRAISAL DISTRICT Joint Motion to Dispose of Protest and Request for Agreed Order

The Travis Central Appraisal District and the listed property owner(s) or the designated agent of the property owner(s), submit this Joint Motion under Section 41.47(f) of the Texas Property Tax Code. The Chief Appraiser and the property owner agree to the disposition of the protest and request the Board to issue agreed order(s) conforming to the agreed to disposition of the matters attached as Exhibit A. The terms of the disposition are listed on the attached Exhibit A. This Motion is submitted to the Chairman of the Travis Appraisal Review Board who "shall issue the agreed order[s] not later than the fifth day after the date on which the joint motion is filed with the Board. If the Chairman is unable to issue the agreed order[s] within the five-day period, the Board shall issue the agreed order not later than the 30th day after the date on which this Motion is filed with the Board." Tax Code § 41.47(f).

An order issued pursuant to this Motion is appealable in the same manner as any other order issued by the Travis Appraisal Review Board.

The property owner or the designated agent of property owner attest to the following:

- A valid protest was filed for the properties listed on Exhibit A attached to this Motion.
- The property owner's selected reason(s) in Exhibit A is the only relief sought and any other matter protested but not listed is withdrawn.
- The property owner or the designated agent are legally authorized to file this Motion.
- The information contained in Exhibit A is correct.
- The right to receive notice of the hearing 15 days before the ARB hearing is waived.
- The right to appear in person at the hearing is waived.
- The right to receive evidence, and other information, pursuant to 41.461 is waived.
- No other rights are waived.

Owner/Designated Agent for Owner  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Travis CAD Appraiser/Staff:  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Owner/Designated Agent for Owner  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Travis CAD Appraiser/Staff:  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# 41.47 JOINT MOTIONS (TOPLINE)



EXHIBIT A

#	PID	Market	Equity	Both	#	PID	Market	Equity	Both
1.	123456	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	26.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.	987654	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	27.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	28.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	29.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	30.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	31.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	32.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	33.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	34.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	35.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	36.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	37.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	38.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	39.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	40.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	41.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	42.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	43.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	44.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	45.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	46.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	47.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	48.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	49.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	50.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

EXHIBIT B

#	PID	Market	Equity	Both
1.	123456	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2.	987654	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# 41.47 JOINT MOTIONS (TOPLINE)

## Procedures

- A **valid** appointment of agent is required to request 41.47 Joint Motion.
- 41.47 Joint Motion will reflect the informal settlement offer published on the Agent portal.



# 41.47 JOINT MOTIONS (TOPLINE)

## Procedures

<b>Monday</b>	Deadline to submit requests to be considered for the week
<b>Wednesday</b>	After review, form will be electronically endorsed by the CAD and a copy emailed to agent
<b>Friday</b>	Complete joint motion request forms are submitted to ARB chair for approval



# 41.47 JOINT MOTIONS (TOPLINE)

## Procedures

- Closed protests will not be included in Joint Motion to the ARB.
- Failure to follow procedures could delay processing of joint motion request.



# EVIDENCE

Travis CAD Website – [www.traviscad.org](http://www.traviscad.org)

Appraisal Roll and Special Exports

- Available for download on website - April 12, 2021
  - [www.traviscad.org/reports-request/](http://www.traviscad.org/reports-request/)
- Updated bi-weekly

Property search values - updated April 15, 2021

- NOAV's PDF available online – April 26, 2021



# EVIDENCE

[www.traviscad.org/reports-request/](http://www.traviscad.org/reports-request/)

HOME > ORGANIZATION > **REPORTS & REQUEST**

## REPORTS & REQUEST

**PUBLICLY AVAILABLE DATA**

APPRAISAL REPORTS

FINANCIAL REF

To submit a public information request, [click here](#).

The following forms are available for downloading and/or printing. These forms require **Adobe Acrobat Reader** or Microsoft Excel **C**

### EXPORT LAYOUT FILE EXPLANATION

APPRAISAL EXPORT LAYOUT

SPECIAL EXPORT LAYOUT

### APPRAISAL ROLL EXPORT

TCAD APPRAISAL ROLL EXPORT

### SPECIAL EXPORT

TCAD 2021 SPECIAL EXPORT





# EVIDENCE

Commercial Evidence Book - April 19, 2021

Residential Neighborhood Profiles – April 19, 2021

For access to confidential information

- Valid appointment of agent
- Protest must be filed

Request using Public Information request system

- [www.traviscad.org/public-information](http://www.traviscad.org/public-information)



# EVIDENCE

- CAD evidence will be made available on Agent Portal.
- Evidence may be produced in phases. Check for multiple documents.
- Evidence creation priority will be given to eFile protest.



# EVIDENCE

- TCAD reserves the right to supplement/modify/change the evidence prior to the 14 day evidence exchange window of the formal hearing.
- TCAD understands that the agent's evidence may change prior to the formal hearing if the property owner supplies additional information.



# FORMAL HEARINGS

The Appraisal Review Board **has not** presented their final 2021 hearing plan and the following information is **subject to change**.



# FORMAL HEARINGS

## Timeline

June 1, 2021 – First day formal hearings

June 21, 2021 - Anticipated start date of formal hearings for agents

July 20, 2021 – Approval of appraisal records by ARB  
90% threshold

August 30, 2021 – Completion of timely-filed protests



# FORMAL HEARINGS

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## Location

850 East Anderson Lane

Remote telephonic hearings will use Sonexis screen share.



# FORMAL HEARINGS

## Scheduling

Date and time certain

- Available on agent portal
- Available on CAD website



# FORMAL HEARINGS

## Board Orders

- Weekly quorum meetings to approve records?
- 1.085 - Electronic Board Orders
  - Email [agentportal@tcadcentral.org](mailto:agentportal@tcadcentral.org) if you prefer to receive electronic PDF board orders in lieu of certified mail.





# REMEMBER

1. Update Appointment of Agent - <https://agent.justappraised.com>
2. eFile protest on Agent Portal – April 12, 2021
  - Required for Informal Meetings and 41.47 Joint Motion
  - Upload evidence
3. Informal Meetings April 19, 2021 - June 18, 2021
  - Get in line online - <https://www.traviscad.org/getinlineonline>
  - Do not delay!!
4. 41.47 Joint Motions April 19, 2021 - August 20, 2021
  - Use request form 4147F
  - [Residentialappeals@tcadcentral.org](mailto:Residentialappeals@tcadcentral.org)
  - [Commercialappeals@tcadcentral.org](mailto:Commercialappeals@tcadcentral.org)
5. Protest deadline – May 17, 2021



# QUESTIONS

Questions regarding eFile and Agent Portal should be directed to [agentportal@tcadcentral.org](mailto:agentportal@tcadcentral.org).

Other questions:

[Residentialappeals@tcadcentral.org](mailto:Residentialappeals@tcadcentral.org)

[Commercialappeals@tcadcentral.org](mailto:Commercialappeals@tcadcentral.org)

