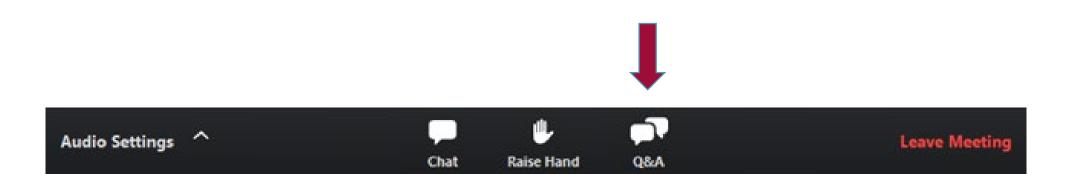
## TCAD UPDATES FOR TAX AGENTS

2025 Protest Season



# HAVE QUESTIONS?



Use the Q&A feature to submit your question.



## IMPORTANT INFORMATION

#### https://traviscad.org/publicinformation

#### PUBLICLY AVAILABLE DATA

#### **EXPORT LAYOUT FILE EXPLANATION**

Export Layouts

#### **OTHER EXPORTS**

- 2024 Supplemental Appraisal Roll Export
- 2024 Supplemental Special Export (JSON)
- 2024 Certified Export (July)
- 2024 Certified Special Export (July)

#### PROTEST INFORMATION

- Agent Formal Hearing Check In Instructions
- Agent Portal Tutorial
- TCAD Updates for Tax Agents 2024 Presentation
- 2024 ARB Letter to Agents
- Single Family Residence Class and Conditions Guidelines



## IMPORTANT INFORMATION

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#### PUBLICLY AVAILABLE DATA

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### IMPORTANT INFORMATION

Travis CAD Website - www.traviscad.org

**Appraisal Roll and Special Exports** 

- Available for download on website April 7, 2025
  - www.traviscad.org/publicinformation
  - Updated bi-weekly

Property search values - updated April 7, 2025

NOAV's PDF available online – April 11, 2025



## IMPORTANT DATES

Notices of Appraised Value April 11, 2025

Protest Deadline (General) May 15, 2025

**Informal Meetings** 

Residential April 14, 2025 to June 27, 2025

Commercial April 21, 2025 to June 27, 2025

BPP June 5, 2025 to June 27, 2025

Formal Hearings Begin June 2, 2025



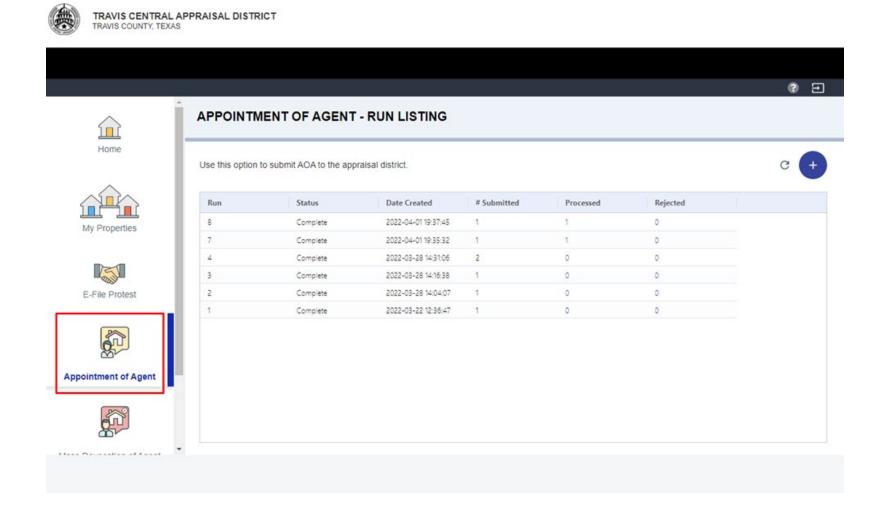
### AGENT PORTAL - APPOINTMENT OF AGENT

Agents must have a valid appointment of agent on file before the informal meeting

- Must be received at least 48 hours prior to the informal meeting
- Submit through the agent portal (most efficient process)



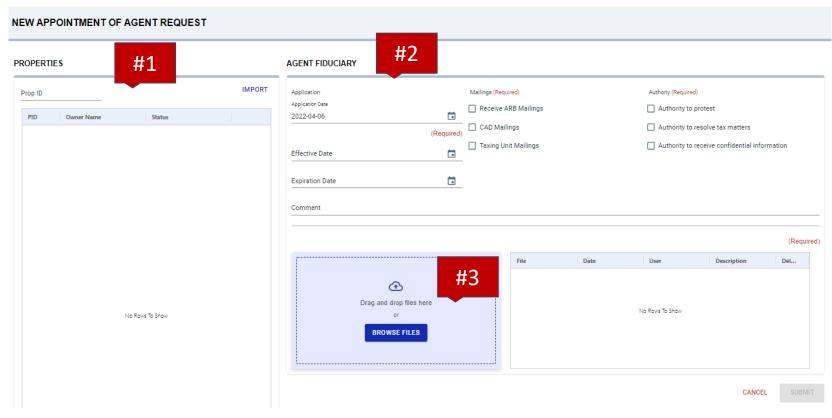
### AGENT PORTAL-APPOINTMENT OF AGENT





#### **AGENT PORTAL-APPOINTMENT OF AGENT**

- 1. Manually add PIDs or import from spreadsheet
- 2. Fill out the appropriate information in the mailings and authority section
- 3. Upload the PDF Appointment of Agent form.





#### **AGENT PORTAL-REVOCATION OF AGENT**



Welcome to Travis Appraisal District Portal



SUMMARY



Active Properties: 1 Needs AOA/Expired Properties: 1

Appointment of Agent

**MY PROPERTIES** 



Mass Revocation of Agent

ACTIONS

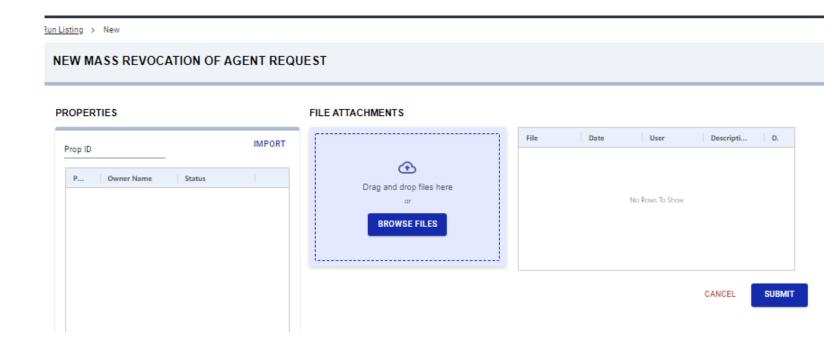
Click here to Manage Properties.

Similarly, agent revocations can be submitted through the Mass Revocation of Agent section of the Menu:



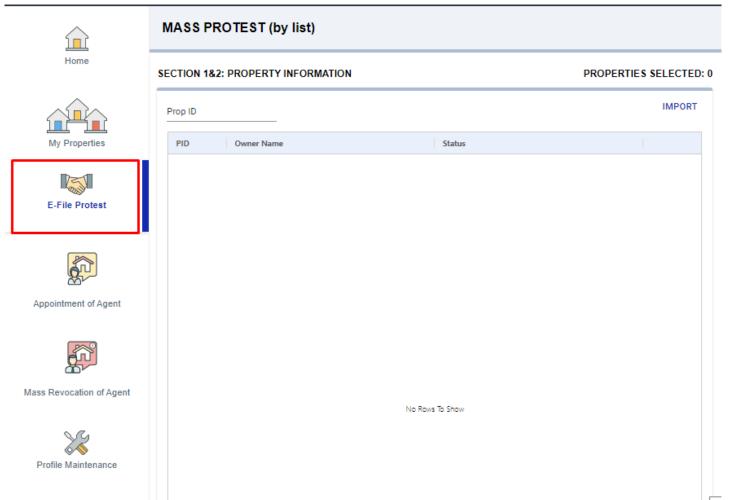
### **AGENT PORTAL REVOCATION OF AGENT**

- 1. Manually add PIDs or import from spreadsheet
- 2. Upload the PDF Revocation of Agent form.
- 3. Click Submit





# AGENT PORTAL – EFILE PROTEST

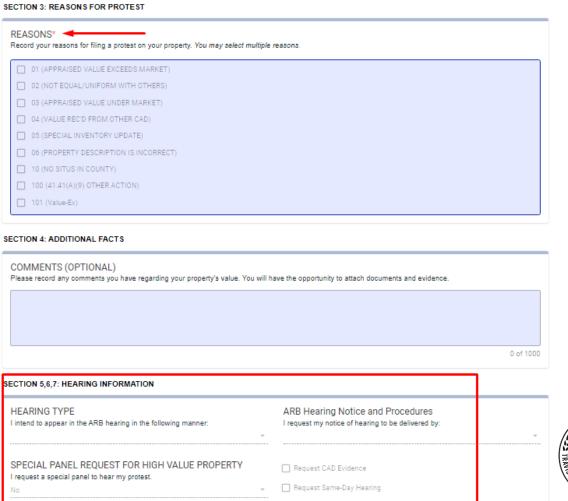


- E-file Protest on left-hand menu
- Enter property ID or import property ID from a list



### **AGENT PORTAL - EFILE PROTEST**

- Select protest reasons
- Add any additional facts you would like to provide
- Select Hearing Information Data
  - Hearing Type
  - Hearing Notice and Procedures delivery
  - Special panel request
  - Receive CAD evidence
  - Request same day hearing





# AGENT PORTAL - EFILE PROTEST

#### Same Day Formal Hearing requests:

- Submit through eFile portal
- Same Day Hearing Request must be filed with your protest

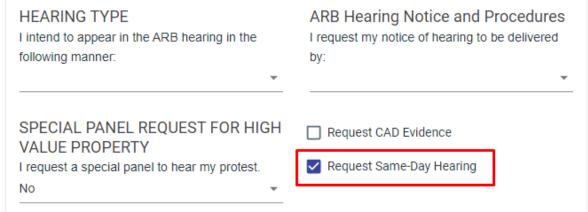


# AGENT PORTAL - EFILE PROTEST

#### Same Day Formal Hearing requests:



#### **SECTION 5,6,7: HEARING INFORMATION**





# AGENT PORTAL

Questions regarding eFile and Agent Portal should be directed to <a href="mailto:agentinfo@tcadcentral.org">agentinfo@tcadcentral.org</a>



Timeline: Residential

April 14, 2025 - June 27, 2025 Monday through Friday 7:45 AM to 11:45 AM and/or 12:45 PM to 4:45 PM\*

\*Select either 4 or 8 hour sessions



Timeline: Commercial

April 21, 2025 - June 27, 2025 Monday through Friday 7:45 AM to 11:45 AM and/or 12:45 PM to 2:45 PM\*

\*Select either 1, 2 or 4 hour sessions

\*Please submit evidence at least 48 hours prior to informal meeting.



Timeline: BPP

June 5, 2025 - June 27, 2025 Monday through Friday 7:45 AM to 11:45 AM and 12:45 PM to 2:45 PM\*

\*Select either 1, 2 or 4 hour sessions



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



#### **Scheduling-Self Scheduling**

Reservation will be handled thru the Agent Portal.

- 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.



For informal meetings the agents must have:

- protest on file, and
- have a valid appointment of agent.
- If these requirements are not satisfied timely, the reservation may be rejected.

Only one informal meeting will be permitted per property.

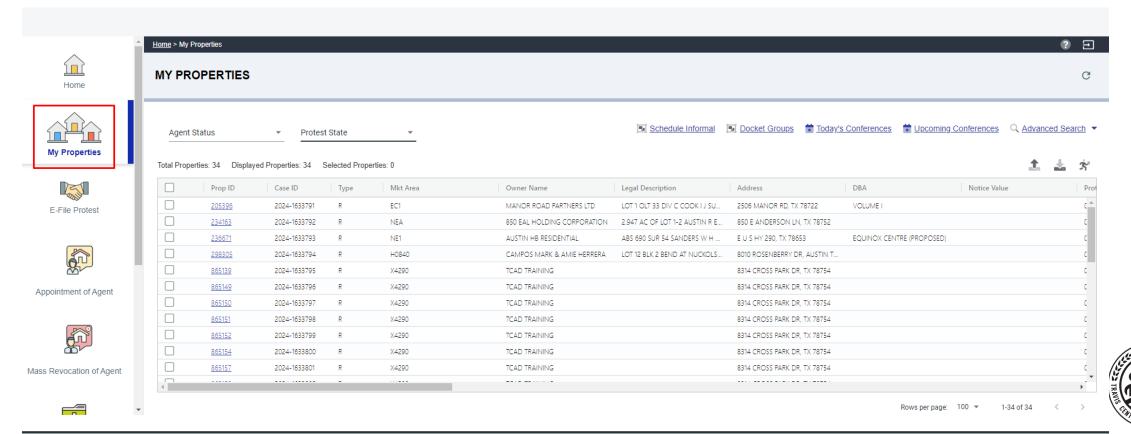


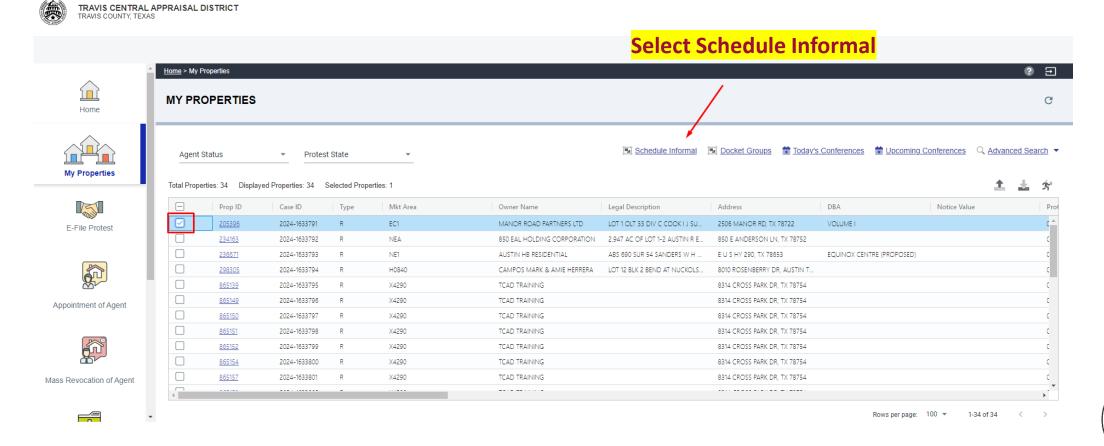
#### Logistics

- Meetings will be held virtually utilizing remote screen share accessed thru
  the agent portal.
- Check-in thru the agent portal and receive text or email updates as preferred.
- At your scheduled time, join the meeting in the same manner as virtual formal hearings using the informal tab.
- Select JOIN to connect to the virtual conference.



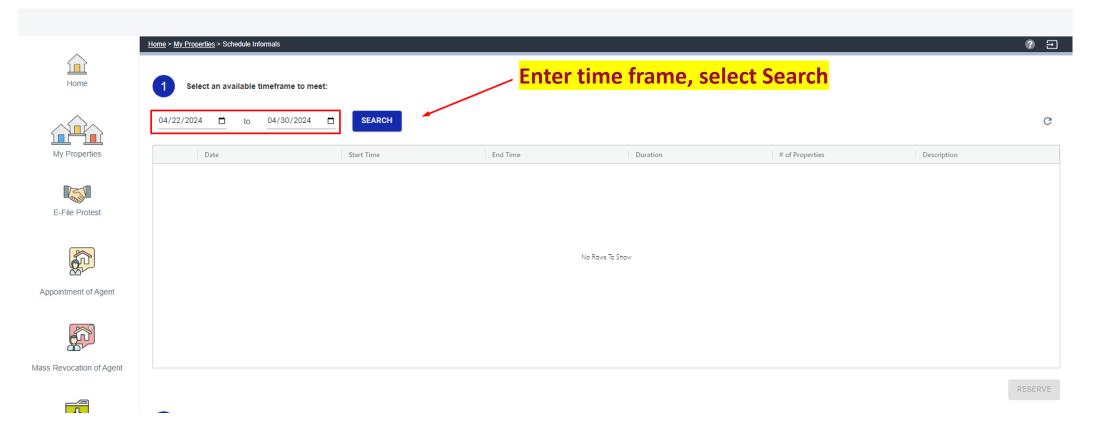






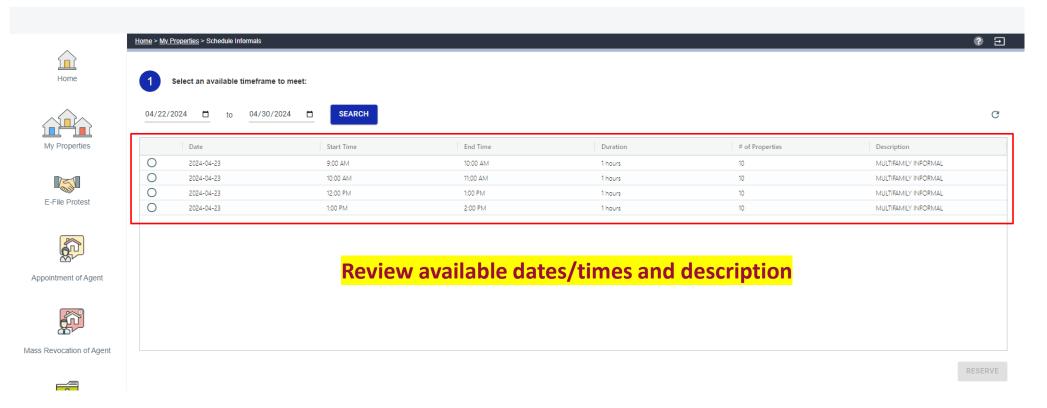




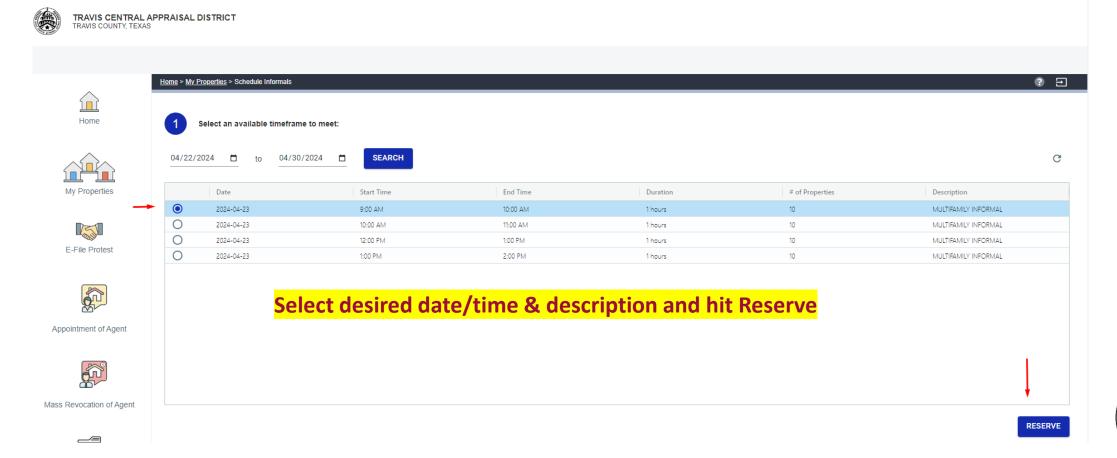






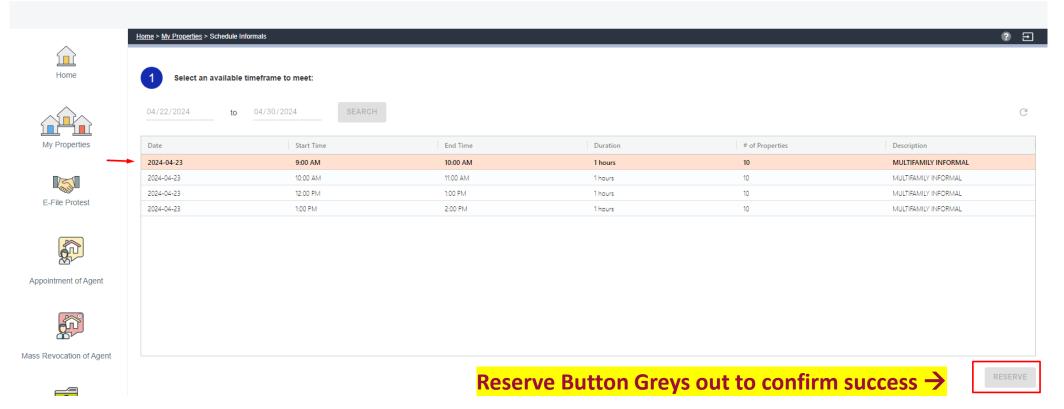




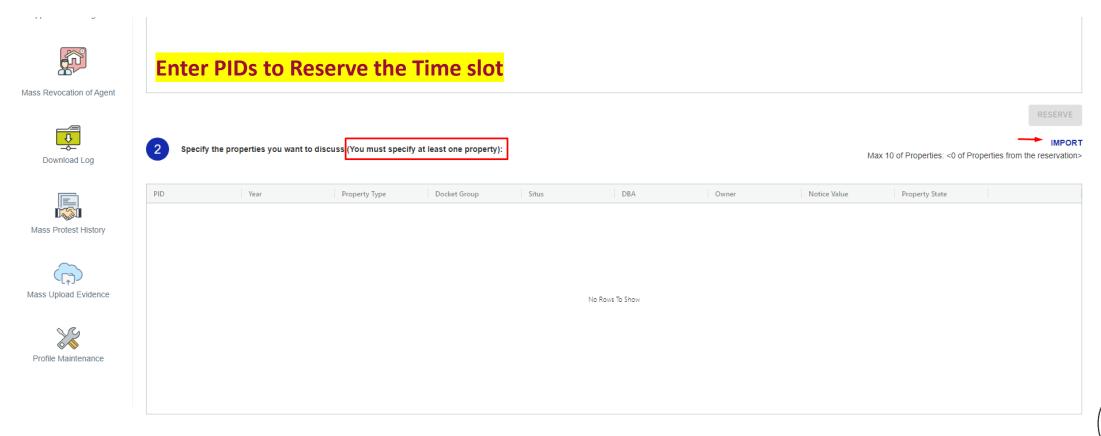














Specify the properties you want to discuss (You must specify at least one property):



Appointment of Agent



Mass Revocation of Agent



Download Log



Mass Protest History



Profile Maintenance

Parcel(s) added will show up. Confirm Property Status is valid. Hit Finish

IMPORT

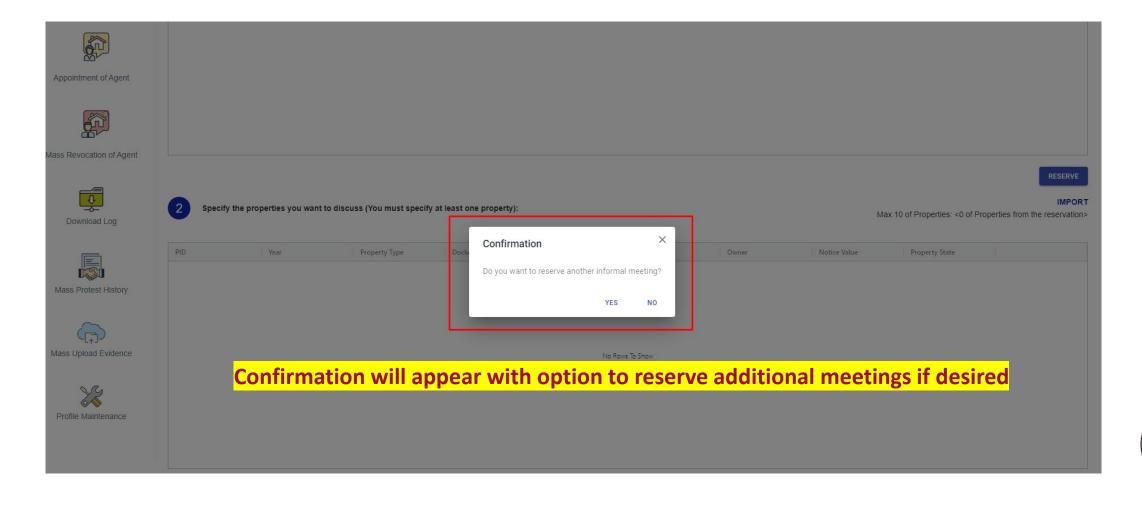
Max 10 of Properties: <1 of Properties from the reservation>

205396 2024 R C_Lg MultiFam 2506 MANOR RD, TX 787 VOLUME I MANOR ROAD PARTNER 0 valid <u>Remo</u> v	
	<u>re</u>
<b>A</b>	

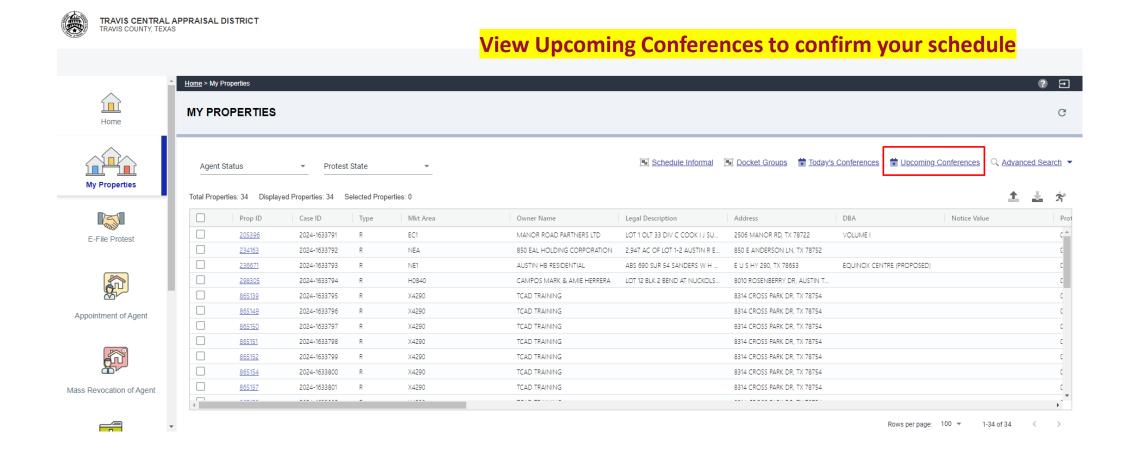
Status refelcts validity of Parcel Status





















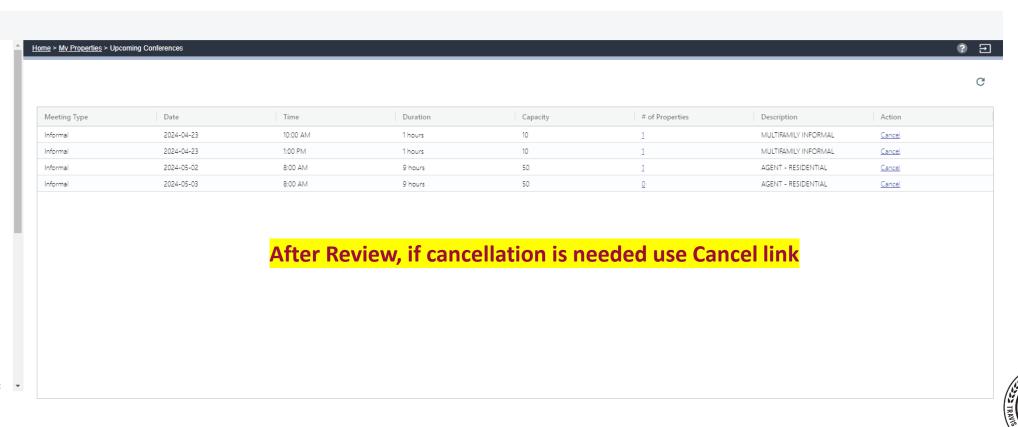
E-File Protest

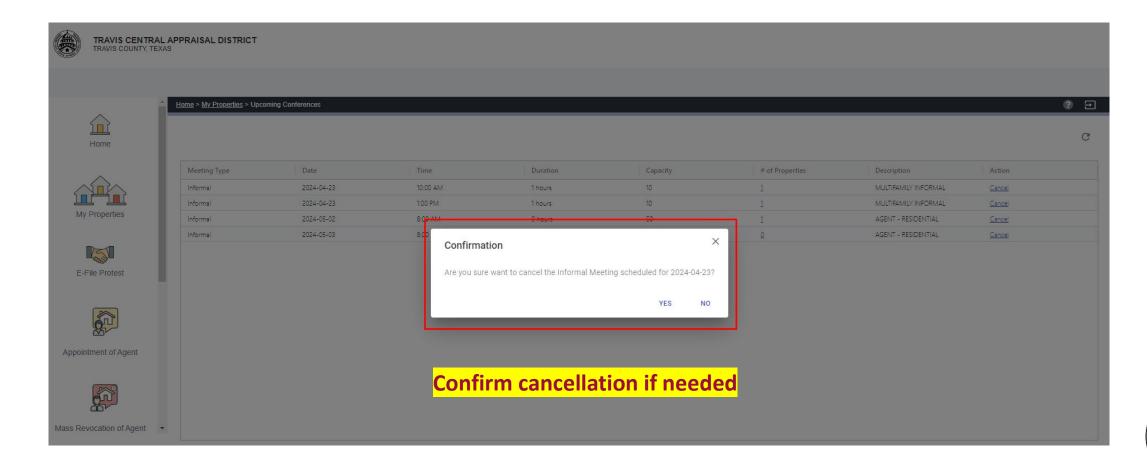


Appointment of Agent



Mass Revocation of Agent

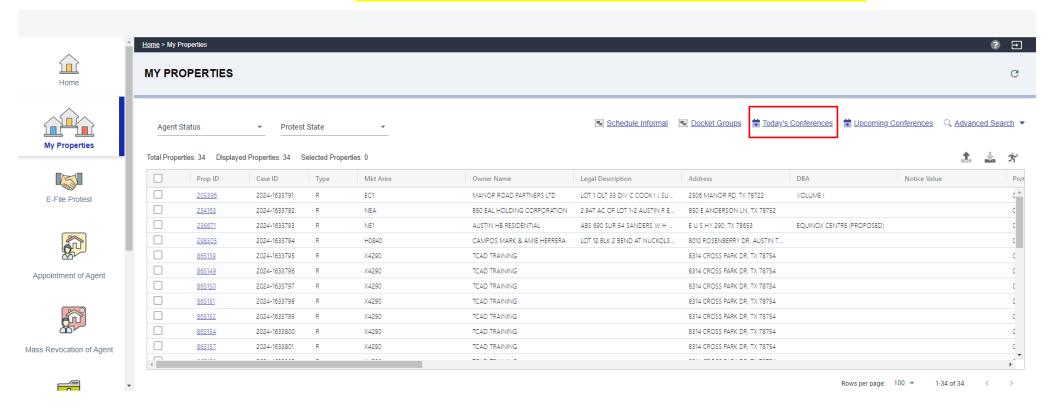








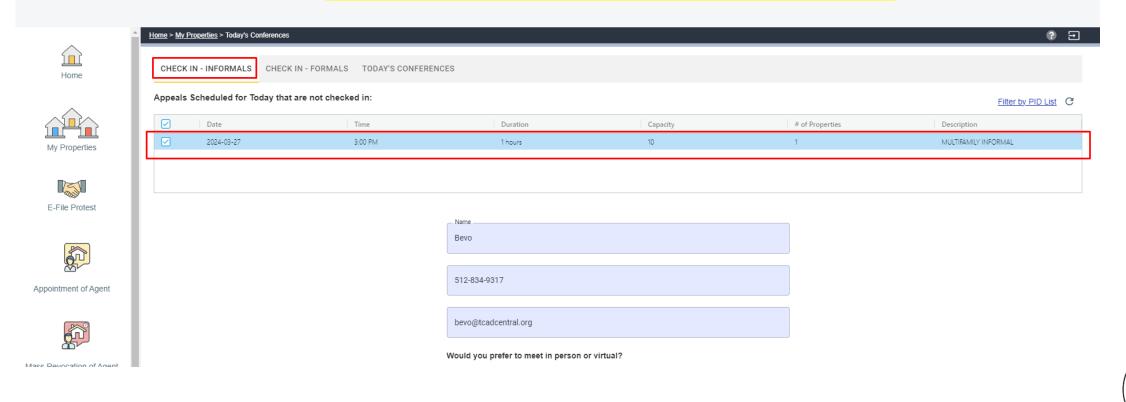
#### Day of Informal meeting select Today's Conferences



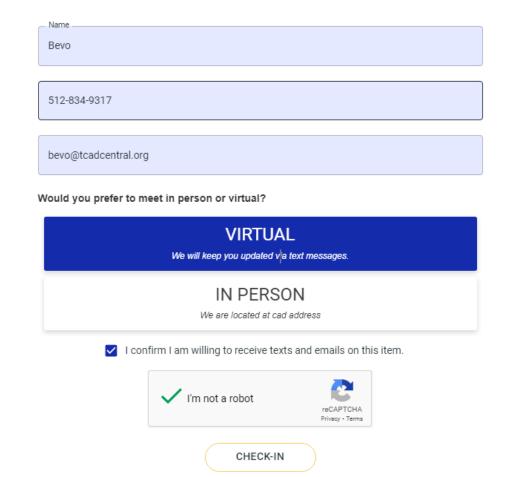




Select check in Informal tab and Select Conference to join







**Enter/Confirm the following:** 

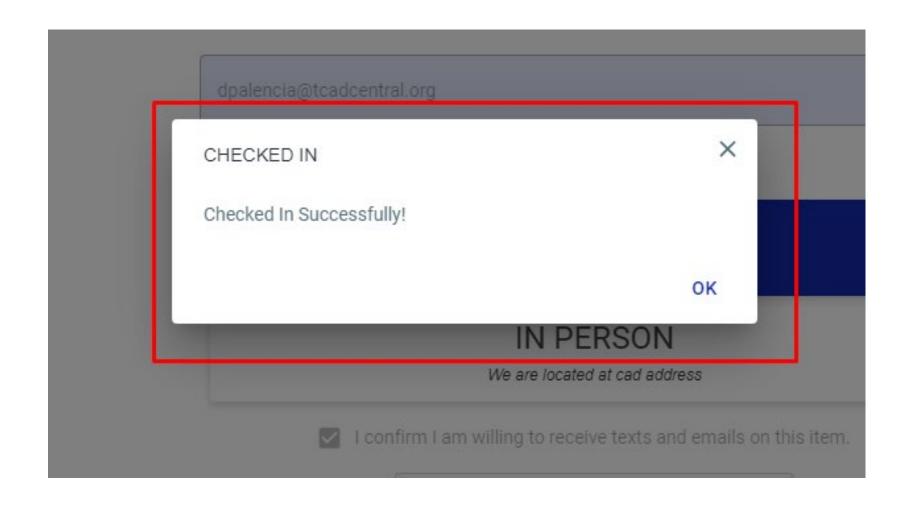
- Name
- Phone Number
- Email address

Select Virtual
(In Person informals are not available)

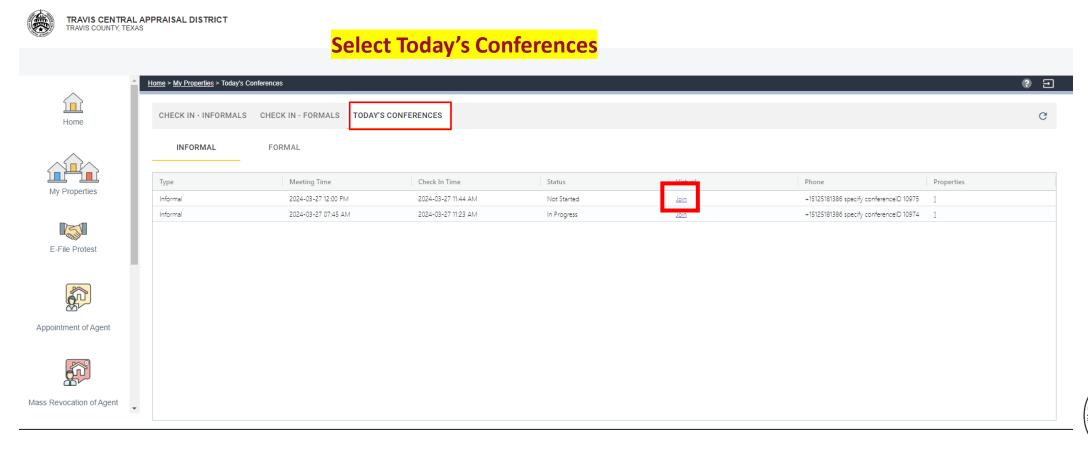
**Confirm for alerts and complete Captcha** 

**Select Check-In** 





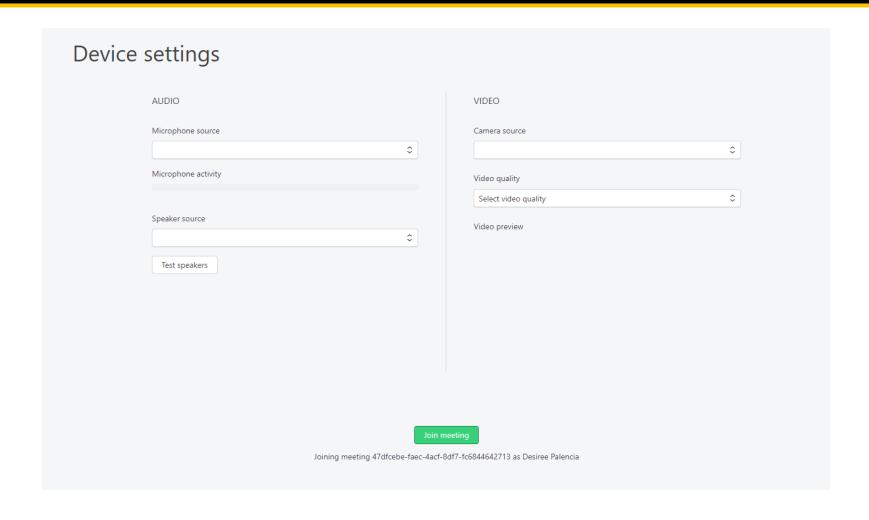






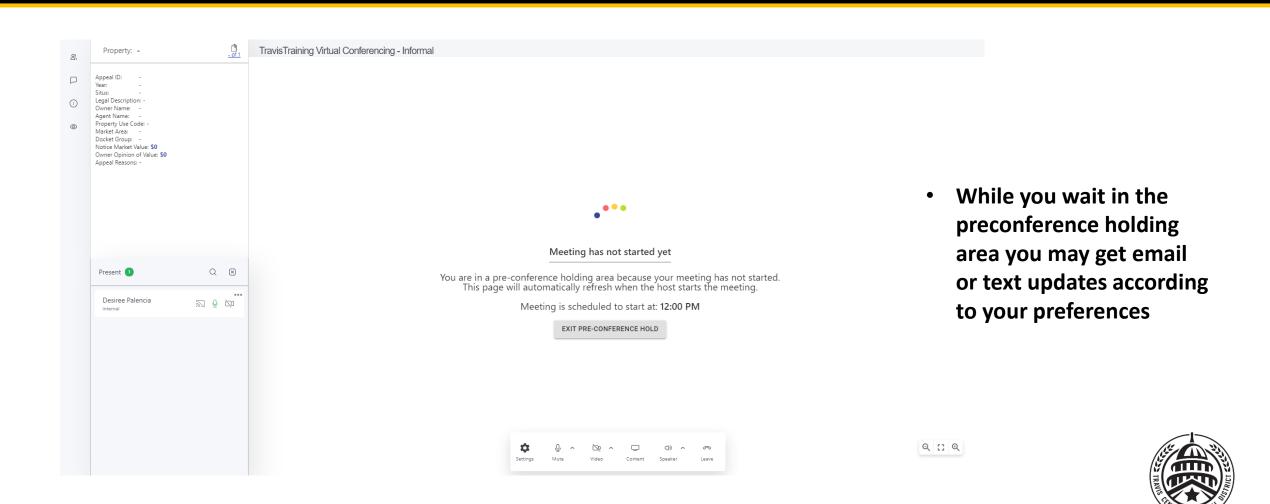
- Name *	Please Identify Yourself	† 
Bevo		
5128349317		
bevo@tcadcentr	al.org	
	JOIN	

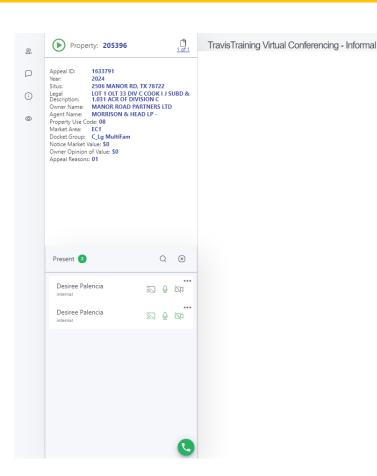




- Confirm A/V Connections for your device
- Select Join Meeting







Meeting information

Audio Only: (737)334-4948 Conference ID: 10975 When the appraiser begins the meeting you will be joined automatically.





### **Offers**

- An informal meeting offer that reduces value is NOT guaranteed.
- All offers will be based solely on documented evidence.
- Please submit any evidence you would like considered at the informal meeting 48 hours <u>PRIOR</u> to the meeting.



#### Offers

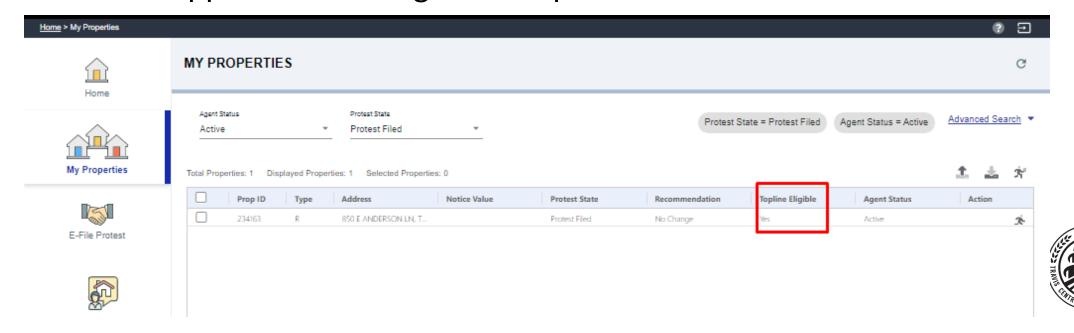
- Appraisers will discuss potential offers during the informal virtual conference.
- Offers will be officially made via agent portal, generally overnight or next day.
  - Lack of uploaded evidence will delay offers.
  - Some offers may require a 41.47 Joint Motion.
- Agents must formally accept the offer in the agent portal.
- TCAD management reserves the right to review all offers for typographical errors, accuracy, fairness, and consistency.



# 41.47 JOINT MOTIONS (TOPLINE)

### **Procedures**

- Topline Agreements will be processed through the agent portal.
- A valid appointment of agent is required for a 41.47 Joint Motion.



# 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**

- 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.



Requests for Electronic Delivery of Documents (TPTC Sec. 1.085) can be submitted through the agent portal.

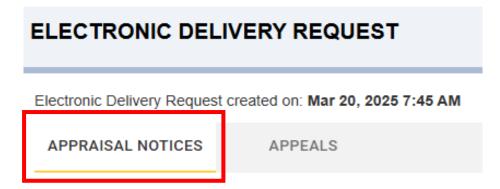








Notifications for Notices of Appraised Value will be emailed and will show in the agent portal.



Notification ID #Properties Message Created Date



Notifications for appeals-related documents (notice of hearing, ARB board orders, etc.) can also be found in the Electronic Delivery Request tab.

# ELECTRONIC DELIVERY REQUEST Electronic Delivery Request created on: Mar 20, 2025 7:45 AM APPRAISAL NOTICES APPEALS

To receive appeal notifications, please update your notification settings by following these steps:

- Navigate to the Profile Maintenance section.
- Select Notification Settings.
- 3. Enable or adjust the settings for Appeal Notifications.
- Save your changes.



To receive notifications of new electronic documents being available in the agent portal, you must have your notification settings turned on.

PROFILE INFORMATION				
<u></u>	Name:	Agent 7		
	Email:			
NOTIFICATION SETTINGS				
Email me updates as my appeal case(s) change				
Send reminder no	otification	prior to appeal hearing		
Method: Email		<u>*</u>		



## REMEMBER

Data available on TCAD website – April 7, 2025
 www.traviscad.org/publicinformation

- Informal Meetings (Residential) April 14, 2025 June 27, 2025
- Informal Meetings (Commercial) April 21, 2025 June 27, 2025
- Informal Meetings (BPP) June 05, 2025 June 27, 2025



# REMEMBER

• Protest deadline - May 15, 2025

• Last day of informal meetings – June 27, 2025



# QUESTIONS

Questions regarding protests should be directed to

ARB\_Info@tcadcentral.org.

Questions regarding the Agent Portal should be directed to agent\_info@tcadcentral.org.

## Other questions:

Residentialappeals@tcadcentral.org Commercialappeals@tcadcentral.org BPPappeals@tcadcentral.org

