Agent Portal Tutorial
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New Agent Account Creation

STEP 1

STEP 2
Click on Create New Login.

STEP 3
Click on Are you an Agent?
STEP 4
Fill in Name, Phone Number, Email Address & Password.

STEP 5
Add Property ID of 1 property you currently represent.
STEP 6
Enter agent eFile pin number.

This information can be found on your Notice of Appraised Value. To request your agent pin number, email agentinfo@tcadcentral.org.

STEP 7
Read and agree to the End User License Agreement.
STEP 8
Click on CREATE NEW LOGIN.

STEP 9
Confirm account via email.

You will receive an email to the email address used during the registration process. You **MUST** click “Confirm Email” in the email to complete your account registration. If you do not receive the email, check your junk folder.
Login to Agent Portal

STEP 1
Enter username and password.

STEP 2
Click on LOGIN.
My Properties Menu

Click on My Properties

You can add and/or remove columns in your My Properties grid.
You can filter the My Properties grid by status.

(For example: active, expired, Needs AOA)

You can filter the My Properties grid by protest state.

(For example: protest filed, protest not filed, protest complete, top-lines, deadline expired)
The running man in the upper right-hand corner is the Action Menu.

Actions available in the Action Menu:

- File Protest
- Withdraw Protest
- Upload Evidence
- Accept CAD Recommendation of Value
- Accept Top Line Agreement
- Reject CAD Recommendation of Value
- Submit AOA
- Revoke AOA
There is also an action menu at the property level.

**Actions available in the Property Action Menu:**

- View Taxpayer or Agent submitted evidence
- Reject Recommendation
- Withdraw Protest
- View CAD Evidence (if available)
- Case Activity
The Advanced Search provides a way to filter the My Properties grid.

You can filter by property information:
You can filter by protest information:
Appointment of Agent

STEP 1
Click on Appointment of Agent.

STEP 2
Click “+” sign to create a new appointment of agent run.
STEP 3
Enter applicable property ID OR import from a list of property IDs.
STEP 4
Add the AOA effective date.

STEP 5
Add expiration date (if applicable).
STEP 6
Add any comments.

STEP 7
Select applicable mailings to receive on behalf of your client.
STEP 8
Select applicable agent authorities.

STEP 9
Upload a PDF version of the AOA form.
STEP 10
Click on SUBMIT.

STEP 11
From the Appointment of Agent landing page, you can view which PIDs were processed in an AOA run. Clicking on the number in the “PROCESSED” column will open a list of PIDs within that run that were processed successfully.
STEP 12

Use the breadcrumbs at the top of the page to return to previous pages.
STEP 13

From the Appointment of Agent landing page, you can view which PIDs were rejected in an AOA run. Clicking on the number in the “REJECTED” column will open a list of PIDs within that run that were not successfully processed.

You can also view which properties need an AOA submitted from the My Properties grid. The Agent Status column provides information regarding the status of the agent (i.e. if you are the active agent, if you need to file an AOA, or if your AOA has expired).
TO SUBMIT AN AOA FROM THE MY PROPERTIES GRID:
Select the property(s) for which you would like to submit an AOA.

Select the action menu.
Click on Submit AOA(s).

Complete Step 4 through Step 10 of Appointment of Agent.
Revoke Agent Authority

STEP 1
Click on Mass Revocation of Agent.

STEP 2
Click the "+" sign to create a new revocation run.
STEP 3
Add property IDs manually OR import property IDs from a list or excel spreadsheet.
STEP 4
Attach PDF revocation form.
STEP 5
Click on SUBMIT.
You can review which PIDs were processed in a specific run by clicking the number under the Processed column.

<table>
<thead>
<tr>
<th>Processed</th>
<th>Rejected</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Use the breadcrumb in upper left-hand corner to return to a previous page.

You can review which PIDs were rejected in a specific run by clicking the number under the Rejected column.
You can also revoke an AOA from the My Properties grid.

Select the PIDs that you want to revoke AOA on.
Click on the action menu.

Click on Revoke AOAs.
Enter your email address to confirm revocation.

Click on Revoke AOAs.
STEP 1
Click on eFile Protest.

STEP 2
Add property IDs manually OR add property IDs from a list or excel spreadsheet using the import function.
**SECTION 3: REASONS FOR PROTEST**

**REASONS**
Record your reasons for filing a protest on your property. You may select from the following:

- 01 (APPRAISED VALUE EXCEEDS MARKET)
- 02 (NOT EQUAL/UNIFORM WITH OTHERS)
- 03 (APPRAISED VALUE UNDER MARKET)
- 04 (VALUE RECEIVED FROM OTHER CAD)

**IMPORT**

**IMPORT**

**COMMENT**
Please record any comments you have regarding your property's value.
STEP 3
You can delete PIDs from your list by clicking the trash can icon.

STEP 4
Select the applicable protest reasons.
STEP 5
Add any additional comments you would like attached to the protest.

STEP 6
Select your hearing type preference.
STEP 7
Select how you would like to receive your hearing notice and procedures.

STEP 8
Select if you would like a hearing with a special panel.

Note: the property must qualify for a hearing with a special panel in order to have a hearing with a special panel.
STEP 9
Select if you would like to receive the CAD's evidence.

STEP 10
Select if you would like to request a same-day hearing.
Note: selecting same day hearing will group all PIDs in Section 1 - Property Information into a same-day hearing request. Same-day hearing requests MUST be submitted at the time your protest is filed.
STEP 11
Upload the protest form and/or same day-hearing request document (if applicable).

STEP 12
Click on SUBMIT PROTEST.
Settlement of Protest

STEP 1
Click on My Properties.

STEP 2
The Recommendation column in the My Properties grid will display any informal offers that the CAD has made.
STEP 3
Click on the property action menu.

STEP 4
Click on Review Recommendation.
STEP 5
Click on REJECT VALUE to reject the CAD informal offer.

STEP 6
Click on ACCEPT VALUE to accept the CAD informal offer.
STEP 7
Click on ACCEPT WITH TOP-LINE AGREEMENT to request a topline agreement.

STEP 8
Review and Agree to the notice and waiver information.
STEP 9
Click on I AGREE
After agreement, TCAD will prepare the topline agreement and preset the joint motion to the ARB Chairperson for approval.