

Attention: Property Tax Agents

RE: 2020 Informal Meeting Procedures

The following contains details and instructions for the informal meeting season. Due to COVID-19 and the resulting shelter-in-place orders issued by Travis County and City of Austin, Travis Central Appraisal District (TCAD) has suspended all face-to-face informal meetings. TCAD will utilize the following procedures for all informal meetings in 2020:

Timeline and Location

- Generally, informal meetings will be held telephonically, Monday through Friday during the months of April and May. Hours of operation will be 7:45AM to 4:45PM.

Scheduling and Check-In

- Informal meetings will be held telephonically.
- Informal meetings will not be scheduled by TCAD and will be held on a first come, first serve basis.
- TCAD will utilize the QLess reservation system. The reservation system allows property owners or agents to get in line remotely for same day appointments or reserve a time in the future. Future timeslots will be added on a rolling basis based on staff availability.
- The reservation system can be accessed at <https://www.traviscad.org/informals> by clicking on the "Get In Line Online" button. Owners or agents must have an active fiduciary agreement and protest on file and must have submitted evidence in order to reserve an informal meeting. If these requirements are not satisfied timely an owner or agent reservation may be rejected.
- Reservations timeslots will be made available in 15-minute increments for property owners or agents representing a single property.
- Reservations timeslots will be made available in one-hour increments for property owners or agents representing multiple properties.
- Appraisers will call the property owners, or their respective agents, in the order they check-in.
- Property owners, or their respective agents, may check-in for up to five properties at a time.
- Property owners or agents will receive only one informal meeting per property.

Commercial Reservations

- Commercial reservation timeslots will be made available on Thursdays and Fridays of each week and will be portfolio specific.
- Morning timeslots will be reserved for owners or agents representing multiple properties.
- Afternoon timeslots will be reserved for owners or agents representing a single property.

Residential Reservations

- Residential reservation timeslots will be made available Monday through Wednesday of each week.
- Morning timeslots will be reserved for owners or agents representing a single property.
- Afternoon timeslots will be reserved for owners or agents representing multiple properties.

Submitting Evidence

- Beginning April 11, 2020, property owners or agents may submit evidence for consideration in the informal meeting.
- Property owners or agents may submit evidence by utilizing any of the following three options:
 - 1) Submit evidence through the eFile portal;
 - a. *This is the preferred and most expeditious method. We do not guarantee that the evidence will be available for the appraiser to review if you choose to use other methods to submit evidence.*
 - 2) Submit evidence via e-mail to evidence@tcadcentral.org
 - a. *Please note, the most expeditious way to submit evidence is through the eFile portal. Please allow approximately 10 business days for processing.*
 - 3) Hand deliver the evidence to the designated drop box in front of TCAD's building.
 - a. *Please note, a delay may result from hand delivery due to the COVID 19 pandemic. TCAD encourages persons to use the eFile portal to ensure the most efficient and prompt service. Please allow approximately 10-15 business days for processing.*
 - 4) Mail through USPS to P.O. Box 149012, Austin, TX 78714
 - a. *Please note, a delay may result from mailed evidence due to the COVID 19 pandemic. TCAD encourages persons to use the eFile portal to ensure the most efficient and prompt service. Please allow approximately 10-15 business days for processing.*

*****All property specific financial data is considered confidential.*****

Meeting Procedures:

- Informal meetings will be informational telephonic meetings with a staff appraiser.
 - The appraiser may review and discuss information and evidence presented by the property owners or agents.
- Appraisal Roll Corrections
 - The appraiser may document into the CAMA software system a recommendation for an informal meeting offer reviewer. The recommendation may contain the following:
 - the key points and issues made by the owner, agent, or appraiser;
 - the property owner's or agent's opinion of value;
 - the appraiser's recommendation; and,
 - Property characteristic corrections
 - the appraiser may make corrections directly into the CAMA software systems for quantitative items such as:
 - Building square footage (based on building plans presented)
 - Existence of fireplaces and swimming pools
 - appraisal roll corrections of qualitative items or items requiring additional analysis will be done by informal meeting offer reviewers and the appraiser may add notes and recommendations. Examples of qualitative items include:
 - Construction quality and condition;
 - Effective age; and,
 - Physical, functional, and economic obsolescence.

Informal Meeting Offers

- An informal meeting offer that reduces value is NOT guaranteed.
- All offers will be based solely on documented evidence.
- Before TCAD makes an offer, TCAD management will review the offer for accuracy, fairness and consistency.
- Reviewers will examine the evidence, and the notes and recommendations from the informal meeting. After examining, the reviewer will determine, if, and how much the offer amount TCAD will offer to the property owner or agent.
- TCAD will make offers to property owners, or their respective agents, on a rolling basis. Typically, TCAD will make the offer no later than the next Friday following the week of the informal meeting. However, the timeframe may be affected by: daily call-in volume, staffing and overtime availability.
- Property owners, or their respective agents, must take action to accept the informal meeting offer through one of the three options below:
 - Through the eFile portal- fastest and most expeditious option;
 - E-mail; or,
 - Automated telephone system - *coming soon*.

Bulk Affidavit (Topline)

- Due to COVID 19, TCAD will not offer notary services. All bulk affidavits must be notarized and submitted to TCAD via e-mail, to commercialappeals@tcadcentral.org or residentialappeals@tcadcentral.org, hand delivered to the drop box in front of TCAD's building, or mailed to P.O. Box 149012, Austin, TX 78714-9012.
 - *Please note, a delay may result from hand delivery and mailed affidavits due to the COVID 19 pandemic. Agents are encouraged to utilize the eFile portal to ensure the most efficient and prompt service.*
- Bulk affidavits will be created and made available each Friday beginning April 17, 2020 and continuing until June 19, 2020.
- To be included on a bulk affidavit, the agent must indicate their intentions by Thursday at noon.
- Bulk affidavits will reflect the offer published via the eFile portal.
- A current FID must be on file with the appraisal district to take advantage of bulk affidavits.
- Commercial
 - Bulk affidavit will be offered on commercial properties valued over \$2,500,000.
 - Properties valued under \$2,500,000 can be added to a bulk affidavit at noticed value (no change).

Summary of Important Dates

COVID 19 is a fluid situation. The dates below are anticipated dates and are subject to change based on events occurring after this letter is mailed. TCAD encourages everyone to be patient as TCAD works together through this as a community.

- April 10th
 - 2020 values are published on the TCAD website. The regular and special export can be found at <https://www.traviscad.org/reports-request/>
 - Appraisers available to work protests via eFile portal

- April 13th
 - Appraisers available for informal meetings via telephone
- April 17th
 - Bulk affidavit made available
- May 15th
 - Protest deadline
- May 30th
 - Last day for informal meetings via telephone

- June 19th
 - Last day for bulk affidavit

Any questions regarding the eFile portal should be directed to agentportal@tcadcentral.org. Thank you in advance for working with TCAD and adhering to the procedures outlined above.

Travis Central Appraisal District

