



2019 BCAD TAX AGENT MEETING



Bexar Appraisal District

STAFF INTRODUCTION

- Roy Sandoval – Assistant Chief Appraiser
- Sarah Yanez – Customer Service Manager
- Linda Rodriguez– Business Personal Property Manager
- Eli Villanueva– Business Personal Property Appraisal Supervisor
- Patrick Harvey – Commercial Dept. Ops Supervisor
- Mario Mancha– Commercial Dept. Manager



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Announcements

- Top Line (Bulk Affidavits) will again be offered this year.
- 2018 record breaking year (108k protests).
- Expedite/streamline ARB season & Improve efficiency/productivity.
- Commercial Accounts may be Toplined if Value is higher than \$500k.
- The BPP Department will be offering the Topline process for 2019.
- Online Services Portal.



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2019 Deadlines

- **Deadline to file your protest is May 15th. Or 30 days after receipt of notices (BPP).**
 - Deadline to file BPP renditions is now April 1.
 - 2019 value notices will be mailed April 1st and will be available on our website thereafter.
 - **BPP next notice run will be mid May.**
 - Your data disk will be available to pick up April 2nd.
 - Regular Scheduled Informals will begin May 21st.
 - **BPP informals will begin June 24th.**
 - Formal Hearings will begin May 28th (Res/-owner/agents).
 - **BPP formals will begin July 1st.**
- *Commercial Properties - Formal Hearing Scheduling***
- Formal hearings on Commercial properties for individual owners will begin May 28th.
 - Formal hearings on Commercial properties represented by an agent who's actively participating in TL/BA will begin June 17th.



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Online Services Portal

- [Portal Banner - Bexar CAD](#) (Hyperlink)
- In order to be able to use the Portal you must first register, create a profile and password.
(Online Portal Tutorial, right after this presentation)
- Through the Online Portal you'll be able to:
 - Have access to all of your accounts information
 - File your protest (multiple properties)
 - Verify & upload your Appointment of Agent Forms
 - Upload your evidence
 - You may still protest all of your Commercial & BPP properties using the Online Portal, including those that fall below the Topline limit (\$500k).



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Prior to Coming in or Scheduling Appointments

“What you need to do”

- Protests lists & AoA forms must be uploaded/sent in 5 days prior to coming in for your informal hearing or appointment.
 - Allowing time to load your Protests &
 - Process any AoAs not previously on file
- Remember; you must have an active protest (prior to IH/IA).
 - Submit your Protest using the Online Portal
 - Upload or Update your new AoAs using the Online Portal or email them to bcadfid@bcad.org
- No appointments required, you may start to come in by April 8th. (assuming you have a protest on file) & for BPP as soon as June 24th.
- You may Schedule an informal appointment if you prefer (especially on high dollar accounts and/or if you want to sit down with any particular appraiser).
- We expect all Commercial Appointments to conclude by June 28th.



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INFORMAL APPOINTMENT AVAILABILITY

- Informal appointments & Informal walk ins will be handled on a “FIRST COME FIRST SERVE” basis.

- Commercial Appraisal Staff will be available for informal meetings/Appts right after notices are mailed.

- If you need to schedule your appointments you may do so as follows:

- Commercial accounts after April 1st
 - BPP after May 15th.

- Commercial Informal Appts. and walk-ins may start as early as April 8th or earlier if you have an active protest & AoA.
 - BPP Appraisal Staff will be available for informal meetings by June 24th.

- You may book your appointments directly with the individual teams by emailing them at:

- Retailteam@bcad.org Industrialteam@bcad.org
 - Officeteam@bcad.org Landteam@bcad.org
 - Multifamilyteam@bcad.org Specialtyteam@bcad.org

- For BPP

- bppappt@bcad.org



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PRIOR TO YOUR INFORMAL OR APPOINTMENT

- Email your list of accounts to the teams at least 3 days prior to your informal appointment; they will coordinate your appointment with an appraiser.
- Sending your list early will make the process more efficient, it will allow us to:
 - Verify AOA
 - Make sure we have the appropriate number of staff available
 - Will allow appraisal staff to get ready for your informal.
 - Do not email lists with other use codes to the teams:
 - Specialty Use codes—Starts with 1
 - Retail—Starts with 2
 - Industrial—3
 - Office—4
 - Multifamily—8
- Don't forget to upload your evidence using the Online Portal or to bring it with you.



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Top Line Rules

- Top Line = Value over Market & E&U protests type only.
- Come ready, with strong evidence, the better evidence you have, the better the chances the property can be TL or closed informally.
 - Agent's work-up
 - Supported by respective Full Operating Statements & Rent Rolls (tenant list)
 - Market Sales Information
 - E&U Grids
 - Lease information (important)
- BPP
 - Come prepared with Agent's work-up
 - Balance sheets, General Ledgers and Fixed Asset Listings

* Instances where Top Line will not be offered *

- Accounts with no evidence provided will not be Top Lined.
- Recently sold properties (24mos)
 - SS must be provided if settlement is to be reached Informally.
 - If SS is not provided expect a no change recommendation at the formal hearing.
 - If you're only pursuing E&U on a recently sold property, you must go straight to your Formal hearing.
- Note: BPP accounts may be eligible for Top Line if rendered by April 1 without an extension request.



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INFORMAL HEARINGS PROCEDURES

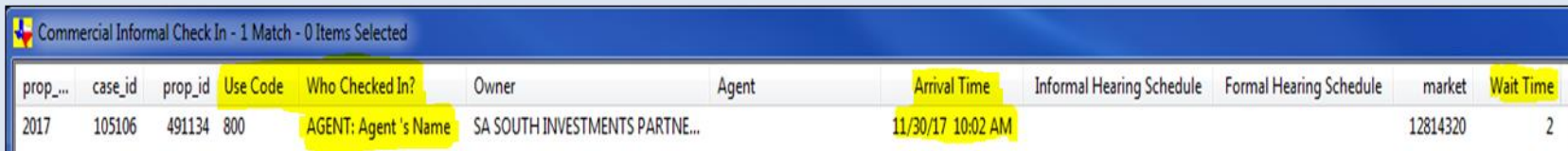
- As it has been the case, there will be no same day informal/formal, no exceptions!
- When attending your TP informal Meeting/appointment or regularly scheduled Informal Hearing
 - Sign-in and wait for an appraiser to come get you.
 - Do Not walk into the department; you must be escorted by an appraiser at all times.
 - You will only be working with your assigned appraiser.
 - When your informal hearing concludes, please walk out and wait until the next appraiser calls you.
 - If you're signed in and you get called down stairs or have to leave for whatever reason, please let the staff member at the front desk know if you're not coming back.
 - Schedule by Use Code, the more time you spend with any particular appraiser the more we'll get done.



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Commercial Informal Check-In Monitor

- Check-in with the staff member stationed on the 2nd floor.



prop_...	case_id	prop_id	Use Code	Who Checked In?	Owner	Agent	Arrival Time	Informal Hearing Schedule	Formal Hearing Schedule	market	Wait Time
2017	105106	491134	800	AGENT: Agent 's Name	SA SOUTH INVESTMENTS PARTNE...		11/30/17 10:02 AM			12814320	2

- From their desktop, appraisers have the ability to see who's checked-in and for how long you've been waiting.
- You may check in for up to 3 use codes at a time.
- If we come get you and you're not there you will be removed from the monitor and you will have to sign back in again.



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INFORMAL HEARINGS RULES

- Unethical and/or abusive behavior will result in the loss of Top Line and informal privileges.
- We must strive for an Environment of Mutual Respect & Professional Courtesy.
- If you're done with your informal/appointment, be mindful that other agents/owners have been waiting; do not go to another appraiser and ask if they're free to work some accounts (Please, go back out to the waiting area & wait for the next available appraiser).
- NOTE: Property owners take priority in the informal process.
- NOTE: This year, we're going to do our best to schedule owners differently and not have them here when you're here, and vice versa.
- Reminder: Informal hearings and/or Top Line processes are a privilege not a right.
 - *The Appraisal District reserves the right to cancel your Inf. & TL Privileges at any time.



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ARB Scheduling

- BCAD will continue scheduling informal hearings as before.
 - May 21st – first day of scheduled informals hearings Residential (Owners/Agents) & Commercial (Owners).
 - **May 28th – first day of ARB formal hearings Residential (Owners/Agents) & Commercial (Owners).**
 - Accounts not completed informally by the end of May will be scheduled for formal hearings starting June 17th. (That's for Agents who are actively participating with topline; all others may be scheduled before then)
 - Remember that ALL protests must be received by the May 15th deadline.
 - **Business Personal Property**
 - Informals to start **approximately** June 24th
 - Formals to start **approximately** July 1st
- *Commercial Properties -Formal Hearing Scheduling***
- Formal hearings on Commercial properties for individual owners may begin on May 28th.
 - Formal hearings on Commercial properties represented by an agent who is actively participating in bulk affidavits will begin June 17th.



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42.227 Informal Settlement Conferences

- The Commercial Department has now taken over these meetings.
- Continue scheduling as before.
- Due to valuation season, we will not be scheduling any 42.227 meeting after Jan1st. Meetings must be scheduled between August 1st. -- Dec. 31st.
- Or they may start as soon as ARB Season ends (assuming the account is under litigation or an existing cause number has been amended).



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What's New for 2019?

- Business Personal Property Department will be using the Topline process.
- Online Portal is available for both Commercial & BPP agent represented accounts: to protest, update your AoA & Upload your evidence.
- You still have the option to come in early (No Appointment Needed).
- Top Line process will be available until June 28th.
- “Priority will be given to those who come in early”.
- Come in early or book your appointments early and take advantage of the Top Line process.
- Bottom Line for Top Line is come in early.



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Top Line-Time Line

- Update your FIDs using the online services portal at www.bcadonline.org or submit your AOAs by email at bcadfid@bcad.org. Your Pin# will be supplied at the Agent meeting, or you may request this information by emailing vrabago@bcad.org or laguilar@bcad.org for assistance in receiving your pin.
- Protest all of your Commercial & BPP accounts using the Online Services Portal.
 - “Online Services Portal” is not available to Agent represented Residential accounts; these accts may be protested in Excel form via baprotests@bcad.org or mailed in.
- Verify your AoA and Upload your evidence.
- Just show up, we’ll work with you, or if you prefer, schedule an appointment.
- Meet with your assigned appraiser, and at the end of your appointment, finalize the affidavits for the accts discussed.
- We’re anticipating the record # of protest trend to continue so let’s make it a smooth season.
- Summer Vacation!!



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Online Portal Tutorial is Next, Stay Tuned

Thank You!

Copy of the presentation will be available on our website



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