



2018 BCAD TAX AGENT MEETING



Bexar Appraisal District

STAFF INTRODUCTION

- Roy Sandoval – Assistant Chief Appraiser
- Scott Griscom – Assistant Chief Appraiser
- Richard Hammond – Commercial Dept. Manager
- Mike Swenson – Lead Litigation Manager
- Sarah Yanez – Customer Service Manager
- Mario Mancha – Commercial Dept. Ops Supervisor



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New Deadlines

Slide Updated 03/21/2018

- **Deadline to file your protest is now May 15th.**
- Deadline to file BPP renditions is now April 1.
- 2018 value notices will be mailed April 2nd and will be available on our website thereafter.
- Your data disk will be available to pick up April 2nd.
- Regular Scheduled Informals will begin May 22nd.
- Formal Hearings will begin May 29th (Res/-owner/agents)
 - ***Commercial Properties Formal Hearing Scheduling***
 - Formal hearings on Commercial properties for individual owners will begin May 29th.
 - Formal hearings on Commercial properties represented by an agent who is actively participating in bulk affidavits will begin June 15th.



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Announcements

- Top Line (Bulk Affidavits/Mass Board Orders) will be implemented this year
 - 2017 protest record breaking year (103k)
 - Expedite/streamline ARB season
 - Improve efficiency/productivity.
 - We will do our best to replicate TCAD “Top Line” Process and procedures
 - Will be offered for Commercial properties only



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Prior to Scheduling Appointments

“What you need to do”

- Top Line/Bulk Affidavits protests & AoA forms must be sent in 5 days prior to appointment.
 - Allow to load your Protests &
 - Process any AoAs not previously on file
- You must have an active protest (prior to IA) if you want to be part of the TP/BA.
 - Email your protest lists to baprotests@bcad.org. (*Excel list form only*)
 - Submit your AoAs to bcadfid@bcad.org
- You may start booking your Informal appointments by April 2nd.
- If you come in early we will work the accounts you want to work on.
- Scheduling informal appointments is not required but we encourage you to do so.
- We expect all Commercial Appointments to conclude by June 29th.



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INFORMAL APPOINTMENT AVAILABILITY

- Commercial Appraisal Staff will be available for informal meetings (by appointment only) right after notices are mailed.
 - *Assuming you have an active protest and have an active AoA*
 - Informal appointments may start as early as April 9th.
- Informal appointments will be handled on a “FIRST COME FIRST SERVE” basis and will follow the high \$dollar down approach.



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HOW TO SCHEDULE YOUR INFORMAL APPOINTMENT

- You May Contact:
 - Michelle Pate at 210-242-2496 or Mpate@bcad.org
 - or Ellie Shunkwieler at 210-242-2490 or eshunkwieler@bcad.org
 - Both of them are Notary Public and will be ready to prepare your Affidavits when you're done with your informal.
- Email your list of accounts to Michelle or Ellie at least 3 days prior to your informal appointment; they will coordinate your appointment with the appropriate 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.
 - Please, try and schedule by use code that way you'll sit with the same appraiser for longer periods of time, Thus, getting more done.



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Top Line Rules

- We need you to schedule your appointments sooner rather than later, **beginning as soon as notices go out** (April 2nd)
- 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 Top Lined.**
 - Agent's work-up
 - Supported by respective Full Operating Statements & Rent Rolls (tenant list)
 - Market Sales Information
 - E&U Grids
 - Lease information (important)

* 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



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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 informal appointment/regular 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.
 - You will only be working with your assigned appraiser.
 - Schedule by Use Code, the more time you spend with any particular appraiser the more you'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, but if we come get you and you're not there you will be removed from the monitor.



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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's desk to ask if they're free to work some accounts (Please, go back out to the waiting area & wait for the next available appsr.)
- NOTE: Property owners take priority in the informal process.
- 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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What's Different for 2018?

- You now have the option to come in early (by appointment).
- Top Line process will be available for **ONLY** those who come in early
- “Priority will be given to those who come in early”
- We encourage you to come in early, have your informal hearing and take advantage of the Top Line option.
- Bottom Line for Top Line is come in early.



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Top Line-Time Line

- Send your Protest list & your new clients AoA to Sarah
- Call and schedule your appointments
- Come and meet with your assigned appraiser
- At the end of your appointment, finalize the affidavits for the accts discussed.
- Summer Vacation!!



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ARB Scheduling

By Sarah Yanez

Slide Updated 03/21/2018

- BCAD will continue scheduling informal hearings as before
- Accounts not completed informally will need to be scheduled for formal hearings
- May 22nd – first day of regular informals (Res/Comm. - owners/agents)
- **May 29th – first day of ARB formal hearings Residential (Owners/Agents) & Commercial (Owners).**
- Evening Informals July 12nd and Formals July 29th
- Personal Property
 - Informals to start June 22nd
 - Formals June 29th

Commercial Properties Formal Hearing Scheduling

- Formal hearings on Commercial properties for individual owners will begin May 29th.
- Formal hearings on Commercial properties represented by an agent who is actively participating in bulk affidavits will begin June 15th.



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Thank You!

Copy of the presentation will be available on our website



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