

# Property Tax Arbitration System (PTAS) Appraisal District User Guide May 2024

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# Introduction

The Comptroller's office developed the Property Tax Arbitration System (PTAS) to allow for more transparency in the arbitration process and to reduce the time and cost associated with administration of the arbitration processes.

Tax Code Chapter 41A and <u>Comptroller arbitration rules</u> provide the foundation of the binding arbitration process. <u>Comptroller Rule 9.4206</u> specifically addresses appraisal district responsibly for processing requests for arbitration. Additional information about arbitration and the arbitrator registry is available on the <u>Regular Binding Arbitration</u>, <u>Limited Binding Arbitration</u> and <u>Arbitrator Registry Application</u> websites.

<u>Comptroller Rule 9.4203</u> prohibits parties to an arbitration and arbitrators from seeking the Comptroller's advice or direction on a matter relating to a pending arbitration. An arbitration is pending from the date a party files an arbitration request until the date of delivery of the award. This prohibition does not apply to the Comptroller's administrative matters, including the processing and curing of requests and deposits.

All screenshots in this document may change as improvements are made to PTAS.

User	View	Edit	Download	Suggested
	Information	Information	Attachment	Users
Appraisal District View Only	Yes	No	Yes	Chief appraiser Taxpayer Liaison Officer Appraisal district employees who will participate in arbitration settlement negotiations or hearings
Appraisal District Reviewer	Yes	Yes	Yes	Appraisal district staff responsible for reviewing RBA and LBA requests received from filers

# User Roles Available for Appraisal Districts

### Appraisal District View Only

This role has view only access. Assign this role to users who must be able to see information, but not edit. This role can view the Appraisal District Dashboard, which shows all filed Regular Binding Arbitration (RBA) and Limited Binding Arbitration (LBA) requests from within the county; view RBA and LBA request data; and download attachments. We recommend this role for the chief appraiser, Taxpayer Liaison Officer and appraisal district employees who will participate in binding arbitration settlement negotiations or hearings.

### Appraisal District Reviewer

This role has the same access as the Appraisal District View Only users and access to **edit** the appraisal district form sections of RBA and LBA requests. This role can also review and submit responses to appraisal district form questions that verify account and property data on requests with a status of Pending Appraisal District Review, Appraisal District Review in Progress or Cure Needed – Appraisal District. This role can attach documents to requests for PTAD to review and receive email notifications for requests, including request status updates and arbitrator acceptance notifications.

We recommend this role for appraisal district staff responsible for reviewing RBA and LBA request received from filers.

# Accessing PTAS eSystems Profile

PTAS users must register and create an eSystems profile at <u>security.app.cpa.state.tx.us</u>. Information on creating an eSystems profile is available on the <u>New User Registration</u> webpage. We recommend using the latest version of Google Chrome, Microsoft Edge, Firefox or Safari for the best user experience.

Welcome to eSystem	S	First time user?			
		Create a profile now.			
		Start managing your tax-related business more easily and all in one place.			
Password:					
Show password					
LOG IN					
	Forgot User ID?				

## Adding/Modifying Users

To add or modify an appraisal district user's access, email the name, email address, eSystems username, county and user role to <u>ptad.arbitration@cpa.texas.gov</u>. We process access change requests in the order received.

### Locating the PTAS Tile

After logging into eSystems, select See More and scroll to the bottom of the program list.



Select Access Property Tax Arbitration System to access the appraisal district dashboard.



The appraisal district dashboard allows users to view filed RBA and LBA requests. PTAS indicates that a request is filed when the request form is complete, and the deposit paid.

The dashboard shows the PTAS-assigned request number, tax year, property account number, property owner name, property address, agent name, request status, settlement

period expiration date, date filed and appraisal district reviewer name. Columns can be sorted filtered and searched by specific data.

# Request Numbering

PTAS assigns the arbitration request numbers. **Exhibit 1** shows the prefix for each type of arbitration filing. Following each prefix is a dash and a six-digit system-generated number. Every RBA and LBA request will have a different six-digit number.

### Exhibit 1 Arbitration Number Prefixes

Prefix	<b>Request</b> Type	Type of Filing
RBAE	RBA	PTAS – electronic filing
RBAP	RBA	Paper filing (property owners only)
LBAE	LBA	PTAS – electronic filing
LBAP	LBA	Paper filing (property owner only)

Each RBA request begins with RBAE, for requests filed using PTAS or RBAP, for requests filed by paper and scanned into PTAS. LBA requests are labeled as LBAE, for requests filed using PTAS or LBAP, for requests filed by paper and scanned into PTAS.

Because some appraisal districts have systems and processes using the previous number format, appraisal districts have the option to assign an appraisal district arbitration number to each request during the Appraisal District Review status.

# Reviewing Requests Reviewing RBAs

Appraisal District Reviewers can select Pending Appraisal District Review at the top of the dashboard to display a list of the requests ready for appraisal district review.

The red plus sign next to a request number on the dashboard indicates the request is for contiguous properties.

Appraisal	Appraisal District - Harris County															
17       8         ALL REQUESTS       8         PENDING APPRAISAL DISTRICT REVIEW																
Filter by 🖓																
	*		e property							^					Date Received	D 1 10 A
Request #	ΤĻ	Tax Year	↓ GEO IL	<b>)</b> ,	Owner Name	.l.Ť	Property Address	.1.↑	Agent Name	î	Status	.1.Î	Settlement Period	.î.↑	$\uparrow_{\downarrow}$	Reviewed By
LBAE-003855 +		2024			Adams, PO		123 zee st				Pending Appraisal Distric	t Review	)			
RBAE-003845		2023					5158 Chocolate Factory				Pending Appraisal Distric	t Review	)			
RBAE-003844		2024			Berryman, Me	gan	555 Candy Moun	tain			Pending Appraisal Distric	t Review				

To review a request, select the blue request number in the first column.

Appraisa	Appraisal District - Harris County															
€= 17 ALL	REQUE	ISTS	⚠	<mark>8</mark> pending	APPRAISAL DIST	RICT RE		<u>î</u>	1 PENDING PTAD I	REVIEW	1					
+ Request involves more than one property																
Request #	$\uparrow_{\downarrow}$	Tax Year	↑ <sub>↓</sub> Geo Ie	• ↑↓	Owner Name	$\uparrow_{\downarrow}$	Property Addres	is ↑	↓ Agent Name	$\uparrow_{\downarrow}$	Status	↑↓	Settlement Period $\uparrow_{\downarrow}$	Date Received $\uparrow_\downarrow$	Reviewed By	$\uparrow_{\downarrow}$
LBAE-003855	+	2024			Adams, PO		123 zee st				Pending Appraisal District R	eview	)			
RBAE-003845	)	2023					5158 Chocolate Factory	•			Pending Appraisal District R	eview				
RBAE-003844		2024			Berryman, Me	gan	555 Candy Mou	Intain			Pending Appraisal District R	eview				

Selecting the request number will open the Request Dashboard.

Regular Binding Ar Request Dashboard	gular Binding Arbitration Request #, IBAE-001279 Status (Tensing Approximatione) Request Dashboard Appraisal District Review Attachments(0) Request History									
Arbitration Status Tra	cker									
Submiss	ion	Review	Settlement Period	Arbitrator	Hearing	Determination				
Request submitted on 04	4/24/2024	Pending Appraisal District Review by 05/04/2024	Settlement period begins after reviews are completed	Arbitrator appointed after settlement period ends	Arbitrator will schedule hearing and provide hearing procedures	A determination will be made by the arbitrator after the hearing is held				
Progress Notes The appraisal district will n appointed to this case.	agress Notes he appsaids for this request. Where we have application for discrepancies that affect either the deposit amount or the eligibility of a property to be included on this request. Once the appraisal district completes their review, you will be notified and be given a chance to review any identified discrepancies before an arbitrator is positive to this case.									
Property Owner Infor	mation									
Name Preeti Garg		Ownership Type Individual								
Contact Information										
Name Garg, Preeti		Phone Number (201) 478-1366	Email Address preetiuatapr&@yopmail.co	m						
Mailing Address 4013 MINERAL DR		City LEANDER	State/Province Texas		Country USA					
Zip Code 78641										
Request Details										
County in which the property Anderson	is located	Tax year as shown on the Al 2024	18 Order	Request involves contiguous tracts of land No	Arbitrator location preference Outside of Anderson county					
Hearing type for this Arbitratic In person only	on									
Property Information										
Account Number Street Address				Request Property Details						
04242024 Texas 101	Type of Property Residential	Appeal Value Type Ag/Timber Productivity Va	ARB Order Received On lue 04/16/2024	Residence Homestead Yes	Property Owner Value \$666,000	ARB Order Value \$777,000				
10,003, 101	Appeal Reasons Details Not Considered I	Methodology Productivity Calculation								

Select the blue **Appraisal District Review** tab followed by **Start Appraisal District Review** to begin the review.

tequiar Binding Arbitration Request #: RBAE 001279 Status: Provide Approxit Discretioner											
Request Dashboard	Request Dashboaris Appraisal District Review Attachments(0) Request History										
Request Details						Start Appraisal District Review					
Property Owner Garg, Preeti	Propert Ander	coration county	Tax Year 2024		Contiguous No						
Owner Account Questio	ns										
Confirm owner account inform 1. Is county listed correct? 2. Is the property owner na	Lanfim owner account information, using your records for the tax year listed on this request.										
Properties											
Select each property linked b	elow to review and confirm property account details, using	your records for the tax year listed on this request.									
Review Progress											
0											
# Reviewed	Property Account Number	Identified Discrepancies									

•

Regular Binding Arbitration Request #: RBAE-001279 Status: Tendag Appendictment Tender										
Request Dashboard Appraisal District Review Attachments(0) Request History										
Request Details					Start Appraisal District Review					
Property Owner Garg, Preeti		Property Location Anderson County	Taix Year 2024	Contiguous No						
Owner Account Questions										
Confirm owner account information, using your records for the tax year listed on this request.  I. b compl failed correct? Use O No Use O No N										
Properties										
Select each property linke	d below to review and confirm prop	erty account details, using your records for the tax year listed on thi	s request							
Review Progress										
0										
# Reviewed	Property Account Numbe	r Identifiet	d Discrepancies							

Complete the preliminary, request level, questions concerning the property's location, whether contiguous, and the property owner's name. You must complete the questions to continue.

	Request Details								
	Property Owner	Property Location	Tax Year	Contiguous					
	Berryman, Megan	Harris County	2024	No					
Owner Account Questions									
	Confirm owner account information, using your records for the tax year listed on this request.								
	1. Is county listed correct?			🔿 Yes	O No				
	2. Is the property owner name correct?			🔿 Yes	O No				

### Select the blue property account number to begin the review for a property.

#### Properties

Sele	Select each property linked below to review and confirm property account details, using your records for the tax year listed on this request.									
Revi	Review Progress									
0	0									
#	Reviewed	Property Account Number	Identified Discrepancies							
1	0	8974562								
2	0	4563								

Complete the Property Account questions. These are property specific questions including whether:

- a protest hearing was held, and ARB order issued;
- the property owner's information is confidential;
- the filer indicated the correct appraisal review board (ARB) value in the request;
- the request was filed by the statutory deadline;
- the protest filed was a Tax Code Section 41.41(a)(1) or (2) protest;
- the property has delinquent taxes; and
- litigation was filed on the same property for the same tax year.

Identify the property category and whether the property account number provided by the filer is the Geo ID or the R number.

Reque	est Details				
Proper Berry	ty Owner nan, Megan	Property Location Harris County	Tax Year 2024	Contiguous Yes	
Property Address Contig Prop 1		Account Number 8974562	Account Number Homestead Exemption 8974562 No		ARB Value \$4,500,000
Prope	rty Account Questions				
1.	Was a Tax Code Section 41.41(a)(1) or (2) ARB order	r issued for this property?		Yes 🔿 No	
2.	Does the property account number match the ARB	Yes 🔿 No			
3.	Is this account number the Geo ID or the R# for this	Geo ID CR#			
4.	Property Category	Property Category*			
5.	Is the parcel address or owner information confider	ntial?		🔿 Yes 🔿 No	
6.	Does the ARB order or appraisal district records ind	licate this property has a Residence Homestead ex	emption according to Tax Code Section 11.13?	Yes 🔿 No	
7.	Is the ARB value correct?			Yes No	
8.	Was the request filed not later than the 60th day af	Yes No			
9.	Are any taxes delinquent on the subject property??			Yes No	
10.	Has litigation been filed for this property for the sa	me reason for the same tax year?		Yes No	

For discrepancies involving the deposit amount or property/account identification, provide additional comments and attachments, if relevant. This information and/or documentation is necessary to help determine if a request must go into the cure period.

F	ile Upload
	Uploaded File Name No documents attached
B	xplanation
	Provide explanation regarding account number, homestead or ARB value discrepancies

<u>Comptroller Rule 9.4244</u> requires the arbitrator to determine all jurisdictional issues, which includes discrepancies that are not related to the deposit or property/account identification.

For requests involving multiple properties, select the blue Property Account Number from the property chart and complete the Property Account Questions for each property in the request.

Pro Se Re	Properties Select each property linked below to review and confirm property account details, using your records for the tax year listed on this request. Review Progress								
0									
#	Reviewed	Property Account Number	Identified Discrepancies						
1	0	8974562							
2	0	4563							

#### Properties

Select each property linked below to review and confirm property account details, using your records for the tax year listed on this request.

#### **Review Progress**

		i of 2 Properties	
#	Reviewed	Property Account Number	Identified Discrepancies
1	$\oslash$	8974562	
2	0	4563	

#### Properties

S	Select each property linked below to review and confirm property account details, using your records for the tax year listed on this request.							
Review Progress								
	2 of 2 Properties							
#	Reviewed	Property Account Number	Identified Discrepancies					
1	$\odot$	8974562						

2 🔗 4563

After reviewing all properties, provide:

- an appraisal district contact to share with the filer and arbitrator for settlement negotiations and scheduling; and
- The appraisal district assigned arbitration number, if any.

You can change the contact at any time.

### Select Complete Review.

Appraisal District Assign	ned Arbitration Number			
Appraisal District Arbitration	Number (Optional)			
Appraisal District Arbitr	ation Contact			
First Name* Appraisal	Last Name* District	Phone Number* (512) 555-5555	Ext	Email Address* appraisal.district@gmail.com
				Save Complete Review

The request status will change on the dashboard to Pending PTAD Review or 45-Day Settlement Period. For cases entering the settlement period, the dashboard also displays the end date of the settlement period.

Request #	$\uparrow_{\downarrow}$	Tax Year $\uparrow_{\downarrow}$ GEO ID	$\uparrow_{\downarrow}$	Owner Name $\uparrow_{\downarrow}$	Property Address $\uparrow_{\downarrow}$	, Agent Name	$\uparrow_{\downarrow}$	Status	$\uparrow_{\downarrow}$	Settlement Period
RBAE-000579		2024		Berryman, Megan	13509 Briarcreek Loop	)		45-Day Settlement Peri	iod	05-24-2024
RBAE-000248 +		2024		RBA 23, Test	Contig Prop 2			45-Day Settlement Peri	iod	05-24-2024

### **Reviewing LBAs**

Appraisal District Reviewers select **Pending Appraisal District Review** at the top of the dashboard to display a list of requests ready for appraisal district review.

The red plus sign next to a request number on the dashboard indicates the request is for contiguous properties.

Appraisal District - Harris County									
17 All requests     8 Pending appraisal district review     1 Pending ptad review									
+ Request involves more than one property									
Request # $\uparrow_{\downarrow}$	Tax Year $\uparrow_{\downarrow}$ GEO ID $\uparrow_{\downarrow}$	Owner Name $\uparrow_{\downarrow}$	Property Address $\uparrow_{\downarrow}$ Agent Name $\uparrow_{\downarrow}$	Status $\uparrow_{\downarrow}$ Settlement Period $\uparrow_{\downarrow}$	Date Received $\uparrow_{\downarrow}$ Reviewed By $\uparrow_{\downarrow}$				
LBAE-003855 +	2024	Adams, PO	123 zee st	Pending Appraisal District Review					
RBAE-003845	2023		5158 Chocolate Factory	Pending Appraisal District Review					
RBAE-003844	2024	Berryman, Megan	555 Candy Mountain	Pending Appraisal District Review					

To review a request, select the blue request number in the first column.

Appraisal District - Harris County										
8 75 All RE	QUESTS	19 PEN	DING APPRAISAL DISTRIC	T REVIEW	5 PENDING PTAD	REVIEW	1 CURE NEEDE	D - APPRAISAL DISTRICT		
+ Request involve	s more than o	ne property							Filter by	7
Request #	↑ <sub>↓</sub> Tax Year	Î↓ GEO ID	$\uparrow_{\downarrow}$ Owner Name	1 ↓ Property Addr	ess ↑↓ Agent Name	$\uparrow_{\downarrow}$ Status	$\uparrow_{\downarrow}$	Settlement Period $\uparrow_{\downarrow}$	Date Received $\uparrow_\downarrow$	Reviewed By $\uparrow_\downarrow$
RBAE-000557	2024		Richardson, Mike	7942 Sparta S	t.	Pending Appra	aisal District Review			
LBAE-000556 +	2024		Doe, John	County Rd 51	2	Pending Appra	aisal District Review			

### Selecting case number will open the Request Dashboard.

Limited Binding Arbitration (LBA) Request - Request - LBAE-001283 Status: Pending Appraisal District Review						
Request Dashboard Appraisal	Request Dashboard Appraisal District Review Request History					
Arbitration Status Tracker						
Submission	Review	Arbitrator	Hearing	Determination		
Request submitted on 04/24/2024	Pending Appraisal District Review by 05/04/2024	Appointed to hear case after review is complete	Present evidence and meet with arbitrator	A determination will be made by the arbitrator		
Progress Notes						
The appraisal district will review your app	olication for discrepancies that affect either	the deposit amount or the eligibility of a pr	operty to be included on this request. Once	the appraisal district completes their review	w, you will be notified and be given a chance	
to review any identified discrepancies be	fore an arbitrator is appointed to this case.					
Property Owner Information						
Property Owner Preeti Garg	Property Owner Type Individual	2				
Request Details						
County Anderson	Tax Year 2024	Hearing Type Preference In person only				

Select the blue Appraisal District Review tab followed by **Start Appraisal District Review** at the bottom of the screen.

Limited B	inding Arbitration (LBA) Rec	Request #: LBA	E-000464 Status: Pen	ding Appraisal District Review				
Request D	Appraisal District Rev	iew						
Arbitration Status Tracker								
Subm	ssion Review	Arbitrator	Hearing	Determination				
<ul> <li>Request on 03/27</li> </ul>	2024 Pending Appraisal District Review by 04/06/2024	Appointed to hear case after review is complete	Present evidence and meet with arbitrator	A determination will be made by the arbitrator				
Progress Not The appraisa appraisal dis	es Il district will review your application for di trict completes their review, you will be no	screpancies that affect either t tified and be given a chance to	ne deposit amount or the eligi o review any identified discrep	ibility of a property to be incl ancies before an arbitrator is	uded on this request. Once the appointed to this case.			
Limited Binding Arbitration (LBA) Request       Request #: LBAE-000464       Status:       Pending Appraisal District Review         Request Dashboard       Appraisal District Review								
Request De	tails				Start Appraisal District Review			
Select each p Request De	property linked below to review and confirm stails	m property account details, us	ing your records for the tax ye	ear listed on this request.				
Property Own Karrie Cerd	er Tax Year a 2024		<sup>Address</sup> 371 Teal Lane Kyle, TX, 7	8640				
Review Pro	gress							
0								
# Reviewed	Property Account Number	Identified Discrepanci	es					
1 O								
	08062018							

# Select the blue property account number to begin the review for a property. This opens the review questions for the selected account number. Properties

Property Owner John Doe	Tax Year Addre 2024 unde	ess efined undefined, undefined, unde	
Review Progress			
<b>•</b>			
Reviewed	Property Account Number Identified Discrepancies		
0	2000		
$\bigcirc$	1900		
0	1800		
0	1700		
nstructions			
nstructions Complete the review Request Details Property Owner	v questions and attach supporting documentation or provide an explanati Tax Year	ion for each identified discrepancy Address	
nstructions Complete the review Request Details Property Owner Doe, John	v questions and attach supporting documentation or provide an explanati Tax Year 2024	ion for each identified discrepancy Address County Rd	512
nstructions Complete the review Request Details Property Owner Doe, John	v questions and attach supporting documentation or provide an explanati Tax Year 2024	ion for each identified discrepancy Address County Rd	512
nstructions Complete the review Request Details Property Owner Doe, John View Questions Is this property listed on y	v questions and attach supporting documentation or provide an explanati Tax Year 2024 por appraisal roll?	ion for each identified discrepancy Address County Rd 	512
Anstructions Complete the review equest Details Property Owner Doe, John iew Questions Is this property listed on y What is the property cate	v questions and attach supporting documentation or provide an explanati Tax Year 2024 our appraisal roll?	ion for each identified discrepancy Address County Rd	512
Astructions Complete the review equest Details Property Owner Doe, John iew Questions Is this property listed on y What is the property cate, Does the property owner	v questions and attach supporting documentation or provide an explanati Tax Year 2024	ion for each identified discrepancy Address County Rd  Ves O No Property Category.*  O Yes O No	512
Astructions Complete the review equest Details Property Owner Doe, John iew Questions Is this property listed on y What is the property cate Does the property aver Does the property accourt	v questions and attach supporting documentation or provide an explanati Tax Year 2024	ion for each identified discrepancy Address County Rd  Ves No Property Category.*  Ves No No No No No No	512
Astructions Complete the review equest Details Property Owner Doe, John is this property listed on y What is the property cate Does the property account Is this account number th	v questions and attach supporting documentation or provide an explanati Tax Year 2024 bur appraisal roll?	ion for each identified discrepancy Address County Rd  Ves No Property Category.* Ves No No No No Ref Ref D Ref	512
Anstructions Complete the review equest Details Property Owner Doe, John iew Questions Is this property listed on y What is the property category Does the property account Is this account number th Does the appraised value.	v questions and attach supporting documentation or provide an explanati Tax Year 2024 bur appraisal roll?	ion for each identified discrepancy Address County Rd  Ves No Property Category.*  Ves No O Yes No O Y	512
Astructions Complete the review equest Details Property Owner Doe, John iew Questions Is this property listed on y What is the property cate Does the property account Is this account number th Does the property account Is this account number th Does the property account Is this account number th Does the property have a	Tax Year 2024	ion for each identified discrepancy Address County Rd  Yes No Yes No Yes No Geo ID R# Yes No	512
Astructions Complete the review Request Details Property Owner Doe, John riew Questions Is this property listed on y What is the property cate Does the property cate Does the property owner Does the property owner Does the property owner Does the property owner Does the approject of the approvement of the approvement State account number the Does the approject of the approvement of the appr	v questions and attach supporting documentation or provide an explanation         Tax Year         2024         bur appraisal roll?	ion for each identified discrepancy Address County Rd  Ves No Property Category.* Ves No O Geo ID R# O Yes No O	512
Anstructions Complete the review equest Details Property Owner Doe, John iew Questions Is this property listed on y What is the property cate Does the property account Is this count number th Does the appraised value, Does this property have a Was a protest filed for this Did the property owner	Tax Year 2024 bur appraisal roll?	ion for each identified discrepancy Address County Rd  Ves No Property Category.* Ves No No Ves No	512
nstructions Complete the review Request Details Property Owner Doe, John view Questions Is this property listed on y What is the property cates Does the property accour Is this account number th Does the appraised value, Does this property accour Is this account number th Does the appraised value, Does this property aver a Was a protest filed for thi Did the chairman of the a Or eview board or chief app 10th day after the date th	Tax Year 2024 our appraisal roll?	ion for each identified discrepancy Address County Rd  Ves No Property Category.*  Ves No Oves	512
nstructions Complete the review Request Details Property Owner Doe, John view Questions Is this property listed on y What is the property cate Does the property accourt to be sthe property accourt Does the property accourt be this account number th Does the property aver Does the property aver Does the property aver Was a protest filed for this Did the chairman of the a Ut day after the date th To th day after the date th	Tax Year 2024 Dur appraisal roll?	ion for each identified discrepancy Address County Rd  Ves No Property Category.*  Ves No Geo ID R# Ves No Geo ID R# Ves No	512

Complete the Property Account questions. These are property specific questions, including whether:

- the property is listed on the appraisal roll;
- the property owner's name on the request matches the owner in the appraisal district records;
- the filer indicated the correct noticed value for the property;
- the property has a homestead exemption;
- a protest was filed for the property for the tax year indicated;
- proper notice was delivered according to Tax Code Section 41A.015;
- the chief appraiser or ARB responded to the notice;
- the request was filed by the statutory deadline;
- the protest filed was a Tax Code Section 41.41(a)(1) or (2) protest;
- the property has delinquent taxes; and
- litigation was filed on the same property for the same tax year.

Identify the property category and whether the property account number provided by the filer is the Geo ID or the R number.

For discrepancies involving the deposit amount or property/account identification, provide additional comments and attachments, if relevant. This information and/or documentation is necessary to help determine if a request must go into the cure period.

F	ile Upload	
	Jploaded File Name No documents attached	
E	xplanation	
	Provide explanation or comments regarding the identified discrepancies	

<u>Comptroller Rule 9.4223</u> requires the arbitrator to determine all jurisdictional issues, which includes discrepancies that are not related to the deposit or property/account identification.

For requests involving multiple properties, select the blue Property Account Number from the property chart and complete the Property Account Questions for each property in the request.

Prop	perties				
Sel	ect each property linke	ed below to review and confirm p	property account details, usi	ng your records for the tax year	listed on this request.
Rec	uest Details				
Pro Jo	operty Owner hn Doe		Tax Year 2024		Address undefined undefined, undefined, undefined
Rev	view Progress				
		4 of 10 Properties			
#	Reviewed	Property Account Number		Identified Discrepancies	
1	$\odot$	2000			
2	$\odot$	1900			
3	$\odot$	1800			
4	$\odot$	1700			
5	0	1600			
«	< 1 2 > »				

After reviewing all properties, provide:

- an appraisal district contact to share with the filer and arbitrator for settlement negotiations and scheduling; and
- The appraisal district assigned arbitration number, if any.

You can change the contact at any time.

### Select Complete Review.

Appraisal District Assigned Ar	bitration Number			
Appraisal District Arbitration Number	r (Optional)			
Appraisal District Arbitration (	Contact			
First Name* Appraisal	Last Name* District	Phone Number* (512) 555-5555	Ext	Email Address* appraisal.district@gmail.com
ARB Contact				
First Name* ARB	Last Name* Contact	Phone Number* (512) 777-7777	Ext	Email Address* ARB.contact@gmail.com
				Save Complete Review

The request status will change on the dashboard to Pending PTAD Review or Pending Arbitrator Acceptance.

Request #	$\uparrow_{\downarrow}$ Tax Year	$\uparrow_{\downarrow}$ GEO ID	$\uparrow_{\downarrow}$ Owner Name	↑↓ Property Address	↑↓ Agent Name	$\uparrow_{\downarrow}$ Status	$\uparrow_{\downarrow}$
LBAE-000554 +	2024		Gribble, Dale	County Rd 512		Pending Art	bitrator Acceptance

# Settlement Period

After the appraisal district review of a RBA request, the request enters a 45-day settlement period (if there are no discrepancies impacting the deposit or property/account identification). During this period and prior to arbitrator assignment, the parties may settle the case and the filer may withdraw the case.

The settlement negotiation processes may vary by appraisal district.

There is not a settlement period for LBA.

### Waiver of Settlement Period

A filer may request to waive the 45-day settlement period for RBA. If the appraisal district agrees to the waiver, an arbitrator will immediately be appointed to the case.

## Withdrawal

For requests filed by paper, property owners must complete the <u>Notice of Arbitration</u> <u>Withdrawal</u> (Form 50-830) and send it to all parties and the Comptroller's office.

For requests filed in PTAS, filers must withdraw the case within the system.

Withdrawals received prior to arbitrator acceptance are considered timely and the deposit is refunded, minus the Comptroller's \$50 administrative fee.

Withdrawals received after arbitrator acceptance are considered untimely and the arbitrator may charge up to the full amount of the property owner's deposit, minus the Comptroller's \$50 administrative fee. Any fee charged by the arbitrator is paid out of the property owner's deposit.

When a case is withdrawn, the status of the case on the dashboard changes to Withdrawn.

Appraisal District - Anderson County										
8         351 ALL REQUESTS           + Request involves more than o	53 PENDING	APPRAISAL DISTRICT REVIE	w	28 PENDING PTAD REVIEW	CURE NEEDED -	APPRAISAL DISTRICT				
Request # $\uparrow_{\downarrow}$	Tax Year $\uparrow_{\downarrow}$	geo id $\uparrow_{\downarrow}$	Owner Name $\uparrow_{\downarrow}$	Property Addre	ess↑↓ Ager	it Name↑↓	Status ↑			
LBAE-000788	2024		Dandy, Jim	211 Joe Louis 75803	St, Palestine, TX		Withdrawn			
RBAE-000775	2024		Kuanar, Ranjan	Test 123 st			Withdrawn			

# Arbitrator Assignment and Hearing Scheduling

When PTAS assigns an arbitrator, the status of the case on the dashboard changes to Pending Arbitrator Acceptance.

Request #	$\uparrow_{\downarrow}$	Tax Year $\uparrow_{\downarrow}$ GEO	OID $\uparrow_{\downarrow}$	Owner Name	$\uparrow_{\downarrow}$	Property Address	$\uparrow_{\downarrow}$	Agent Name	$\uparrow_{\downarrow}$	Status	$\uparrow$
RBAE-000419		2024		Burleigh, Cathe	rine	1910 Rogers St				Pending Arbitrator	Acceptance

PTAS notifies arbitrators of pending assignments by email. Arbitrators accept or decline an assignment immediately within the system. If an arbitrator does not accept an assignment within 10 calendar days, PTAS removes the arbitrator from the case and assigns a new arbitrator.

After an arbitrator accepts a case, the status on the dashboard changes to Arbitrator Accepted and contact information for the parties becomes available. Withdrawals received while in the Arbitrator Accepted status or beyond are considered untimely.

Request #	$^{↑ ↓}$ Tax Year $^{↑ ↓}$ GEO ID	$\uparrow_{\downarrow}$ Owner Name	$\uparrow_{\downarrow}$ Property Address $\uparrow_{\downarrow}$ Agent Name	$\uparrow_{\downarrow}$ Status
RBAE-000374	2024	Wade, KD	49 Prestwick Ln, Amarillo, TX 79124	Arbitrator Accepted

After an arbitrator schedules a hearing and adds the hearing date information to the request dashboard, the status changes to Hearing Scheduled.

Appraisal Dis	Appraisal District - Anderson County											
€ 372 ALL REQUES	TS 50 PENDING APP	PRAISAL DISTRICT REVIEW	29 PENDING PTAD REVI	ew 2 CURE	NEEDED - APPRAISAL DISTRICT							
Request # $\uparrow_{\downarrow}$	Tax Year $\uparrow_{\downarrow}$ GEO ID $\uparrow_{\downarrow}$	Owner Name $\uparrow_{\downarrow}$	Property Address ↑↓ Agent	Name↑↓ Status ↓	Settlement Period $\uparrow_{\downarrow}$							
LBAE-000867	2024	Owner, Sam	Travel Way	Hearing Sch	neduled							
LBAE-000476 +	2024	Cabello, Myriah	109 Friendship Rd. Kyle, TX 78640	Hearing Sch	neduled							

Li	imited Binding Arl	oitration (LBA) Requ	est Request #: LBAE-	000867 Status: Hearing	g Scheduled		
	Request Dashboard	Appraisal District Review					
1	Arbitration Status Trac	ker					
	Submission	Review	Arbitrator	Hearing	Determination		
	<ul> <li>Request submitted on 04/17/2024</li> </ul>	Complete Complete on 04/19/2024	Arbitrator Accepted Complete on 04/23/2024	Hearing Scheduled for 04/24/2024 16:52:25	A determination will be made by the arbitrator		

The Arbitration Status Tracker shows the hearing date and time for each case.

After a hearing date passes, the status on the dashboard changes to Pending Determination until the arbitrator enters the award for the case.

Regular Binding Arbitration Report # RBAF-400408 Status (Hoof a Security Arbitration) Request Dashboard Appraisal District Review Attachments(0)									
Arbitration Status Tracker									
Submission	Review	Settlement Period	Arbitrator	Hearing	Determination				
Request submitted on 03/18/2024	Request Review Complete Complete on 03/18/2024	Settlement period completed on 03/18/2024	Arbitrator Accepted Complete on 03/15/2024	Hearing Completed on 04/15/2024	A determination will be made by the arbitrator				
Progress Notes The arbitrator Will review the information and evidence presented at the arbitrator hearing and make a determination.									

# Arbitrator Determination and Award

Arbitrators must use PTAS to make determinations on both RBA and LBA cases. Paper award forms are no longer allowed. A printable PDF version of the award form will be available in PTAS.

### Dismissals

When an arbitrator dismisses a case, the status on the dashboard changes to Dismissed.

Appraisal Dis	trict - An	derson C	County						
STE 372 ALL REQUES	STS	50 PENDING A	PPRAISAL DISTRICT REVIEW			29 PENDING	PTAD REVIEW		2 CURE NEEDED
+ Request involves mo	re than one pro	perty							
Request # $\uparrow_{\downarrow}$	Tax Year $\uparrow_{\downarrow}$	geo id $\uparrow_{\downarrow}$	Owner Name $\uparrow_{\downarrow}$	Pro	perty Ado	dress $\uparrow_\downarrow$	Agent Name $\uparrow_\downarrow$	Sta	tus↑↓
RBAE-000005	2022		Rudd, Paul	14( Pal	)9 E Park estine, TX	Ave, ( 75801		Di	smissed
RBAE-000004	2022		Rudd, Paul	140 Pal	)9 E Park estine, TX	Ave, ( 75801		Di	smissed

The appraisal district can select the request from the dashboard and select the Award tab to view the dismissal reason.

Regular Binding Ar	Request #: R	BAE-0000	05 Status:	Dismissed			
Request Dashboard	Attachments(	) Award	)				
Arbitrator Dismissal							
Property Owner Tax Year Rudd, Paul 2022		County Anderson	County				
Property Address		Account No	Geo ID	CAD Arbitration No	C	Dismissal Reason(s)	
1409 E Park Ave, Palestine, TX 7	65136922			1	. The property owner or property owners agent withdraw the request.		

### Awards

When an arbitrator awards a case, the status on the dashboard changes to either Determination in Favor of Appraisal District or Determination in Favor of Property Owner. The appraisal district can select the request from the dashboard and select the Award tab to view the determination.

If a case is determined in favor of a property owner, the appraisal district is responsible for paying the arbitrator's fee outside of PTAS. The appraisal district must pay the arbitrator's fee upon notification of an award made in PTAS.

# **Future Enhancements**

PTAD is continuously working on improvements to PTAS and will be updating screens and experiences, including extensive reporting and data download options, often within the first several months after going live. Feel free to reach out with comments or suggestions for future enhancements by emailing <u>ptad.arbitration@cpa.texas.gov</u>.