

Agent Instructions

Step 1. Select sign up.

Step 2. Register with the CAD.

- HARRIS CLIENTS

Agents will use their Agent ID and PIN to register to the Agent Portal. The agents' PIN will be located on their notice.

Step 3: Enter the Agent ID and PIN, click Validate.

Step 4: Your Agent name will appear once validated through the CAD office.

Step 5: Enter your email address, phone number, and password to complete the registration process, click the box to agree to the term, and click register.

The screenshot shows a registration form titled "Register as an Agent". It includes the following fields and elements:

- Agent ID * (text input)
- PIN * (text input)
- Validate (blue button)
- Name * (text input)
- Email Address * (text input)
- Phone Number (text input)
- Password * (text input)
- Confirm Password * (text input)
- I agree to the terms and conditions.
- Register (light blue button)
- Already have an account? [Login](#)

When the registration is complete, you will be redirected to the login screen which will allow you to login.

The screenshot shows a login screen with the following elements:

- Logo: A blue square with a white magnifying glass icon.
- Section Header: **Welcome To the BIS Demo Site Online Appeal Process.**
- Text: "In Addition to Filing Your appeal via Printed Forms, Some Property Types Now Have the Option to File Appeals Electronically. If You Have Questions During the Appeal Process, Please Refer to the Help, Or Contact the Appraisal District Directly. You must File a Separate Appeal for Each Property You Intend to Appeal."
- Section Header: **Welcome Back**
- Text: "Please Enter Your Details"
- Buttons: "I'm An Agent" (blue) and "I'm A Tax Payer" (white with blue border)
- Text Input: "dixon@gmail.com" (with email icon)
- Text Input: "....." (with eye icon for password visibility)
- Button: "Login" (blue)
- Text: "Forgot Password?" (blue link)

Step 6: Sign in using username and password.

Agent Instructions

Property List

By default, the property list screen displays all properties that are currently coded to the agent in PACS.

The Property Search feature helps Agents to search for any property. Agents can also upload a CSV list of property IDs if some properties are not listed that they are codes to.

If a property is not listed the Agent can use the search feature by typing in a single PID, or pasting a comma-separated list of PIDs paste a comma-separated list of properties into the search box. They can also use the “CSV list” feature to search for properties by uploading a CSV.

Agents will have the option to file their appeal from this page, as well as see the property type, neighborhood, address, owner's name, notice value, and appraisal notice.

The screenshot shows the 'Property List' interface. At the top, there is a navigation bar with 'Property Search' selected. Below the navigation bar, there is a search bar and a 'Total Records: 35' indicator. The main content area contains a table with the following columns: eFile Appeal, Property ID, Type, Neighborhood, Address, Owner Name, Notice Value, and Appraisal Notice. The table lists various properties with their respective details.

eFile Appeal	Property ID	Type	Neighborhood	Address	Owner Name	Notice Value	Appraisal Notice
Appealed	56131	Personal				\$41,151	
Appealed	56130	Personal				\$66,913	
Appealed	56129	Personal				\$18,739	
Appealed	55328	Personal				\$45,842	
Appealed	51815	Mineral				\$100	
Appealed	51810	Mineral				\$100	
eFile Appeal	51807	Mineral				\$100	
eFile Appeal	51806	Mineral				\$100	
eFile Appeal	51577	Personal		501 BOBB ST TRINITY, TX 75862		\$1,275	
Appealed	52031	Personal				\$25,575	
Appealed	308176	Real	(LAKE) LAKE L ACRES	RUSH CREEK LN TRINITY, TX 75862		\$5,224	
Appealed	47556	Real	(WWW) West Wood Village	80 WESTWOOD DR W TRINITY, TX 75862	ROGERS ALLEN WAYNE	\$74,095	
Appealed	22535	Real	(WWW) West Wood Village	76 WESTWOOD DR W TRINITY, TX 75862	HARBOR POINT RESORT CO	\$33,500	
Appealed	26130	Real	(WWW) West Wood Village	78 WESTWOOD DR W TRINITY, TX 75862	BARN JAMES A & SHIRLEY CAMERON	\$65,010	
Appealed	26129	Real	(WWSOW) WWSOW/SALT CREEK	154 WEST CREEK TRINITY, TX 75862	PINEGN JUDD J	\$5,643	
Appealed	25079	Real	(WWS) WWS IMPS ONLY	PINNACLE TRINITY, TX 75862	JOHNSON KEVIN GARY	\$4,376	

Agent Instructions

To file appeals in bulk, the Agent should select all the properties for which Appeals need to be filed and click on the eFile Appeal button at the top of the grid.

The screenshot shows the 'Property List' interface. At the top, there are navigation tabs: 'Appeal Summary', 'Associated Agents', 'Property Search' (active), and 'AOA Maintenance'. A 'Logout' button is in the top right. Below the tabs, there are radio buttons for 'Appeal accounts you are coded to', 'Property ID' (selected), and 'CSV list of Property ID'. A search bar is present with the text 'Search here...'. A table of properties is displayed with columns: eFile Appeal, Property ID, Type, Neighborhood, Address, Owner Name, Notice Value, and Appraisal Notice. Two rows are visible, both with 'eFile Appeal' buttons highlighted in blue. A red box highlights one of these 'eFile Appeal' buttons. At the bottom, there is a footer with 'Web Design By: BIS Consultants', 'Version: 1.3', and 'Last Updated: Today'.

A new window will generate for them to choose the reason for the appeal. In this window, the Agent will be asked to complete the appeal form to efile the appeals for the accounts selected. Once submitted, the agent will be able to view the list of appeals filed in the Appeal Summary tab of their portal account.

The screenshot shows the 'eFile Appeal' form overlaying the 'Property List' table. The form contains the following fields and options:

- Company Name:** Dixon Anna
- Agent's Name:** (empty text field)
- Telephone Number:** (text field with placeholder '(xxx) xxx-xxxx')
- Email Address:** (empty text field)
- Reasons for Appeal:**
 - Incorrect appraised (market) value
 - Value is unequal compared with other properties
 - Property should not be taxed
 - Failure to send required notice
 - Other
 - Exemption was denied, modified or cancelled
 - Change in use of land appraised as ag-use, open space or timber land
- Comments:** (empty text field)
- Consent:** Please select this checkbox to give consent to the agent to file Appeal on your behalf. (checkbox)
- Submit:** (button)

The background shows a portion of the 'Property List' table with columns: eFile Appeal, Property ID, Type, Neighborhood, Address, Owner Name, Notice Value, and Appraisal Notice. The table contains multiple rows of property data.

Agent Instructions

The agent can file appeals for as many accounts as they would like to at one time. The options chosen will reflect on all the accounts selected.

The screenshot shows the 'Property List' interface. At the top, there are navigation tabs: 'Property Search', 'AOA Maintenance', 'Associated Agents', and 'Appeal Summary'. The user is logged in as 'Agent ID: 31031'. The main content area has a search bar and a table of properties. The table has columns for 'eFile Appeal', 'Property ID', 'Type', 'Neighborhood', 'Address', 'Owner Name', 'Notice Value', and 'Appraisal Notice'. The table shows 10 records, with 3 properties pending appeal. The 'eFile Appeal' column has dropdown menus for each row, with some showing 'Pending' and others 'Appealed'. There are also filters for 'Property ID' and 'CSV list of Property ID' at the top right.

eFile Appeal	Property ID	Type	Neighborhood	Address	Owner Name	Notice Value	Appraisal Notice
Appealed	55201	Real	(SCRE) GROVETON E1			\$95,90	
Appealed	50212	Personal		381 E First St, TX		\$0	
Appealed	50211	Personal		520 W First St, Groveton, TX 75845		\$9,371	
Pending	20237	Real	(STRE2) STD RURAL MHS	282 JUNGLE VILLAGE RD TRINITY, TX 75862		\$93,788	
Pending	37289	Real	(SHRINT) HARBOR POINT INT	PINEWOOD DR TRINITY, TX 75862		\$4,360	
Pending	22292	Real	(HAWGHEAVEN) HAWG HEAVEN	N SUNFISH LN TRINITY, TX 75862	FIRST AMERICAN CAPITAL FUNDING	\$4,580	
eFile Appeal	37720	Real	(SCRE) GROVETON E1		ENGLAND SIDNEY	\$481,066	
eFile Appeal	37251	Real	(HAWGHEAVEN) HAWG HEAVEN	1059 BIG HAWG DR TRINITY, TX 75862	BROWN LEWIS	\$2,725	
eFile Appeal	25113	Personal			LITRELL HENRY G JR (D)	\$0	
Appealed	1052	Personal		941 ROBB ST TRINITY,	TRINITY ISO TRUSTEE	\$89,004	

After an appeal has been filed the status in the eFile Appeal column will show as Pending, once the site has processed the appeal it will change the status to Appealed.

Appeal Summary

When the Appeals are filed, they will appear on the Appeal Summary page. The Agent can search for property IDs, filter by the hearing date, the status, and the property type. Agents can also open the Property ID number to look over the account details.

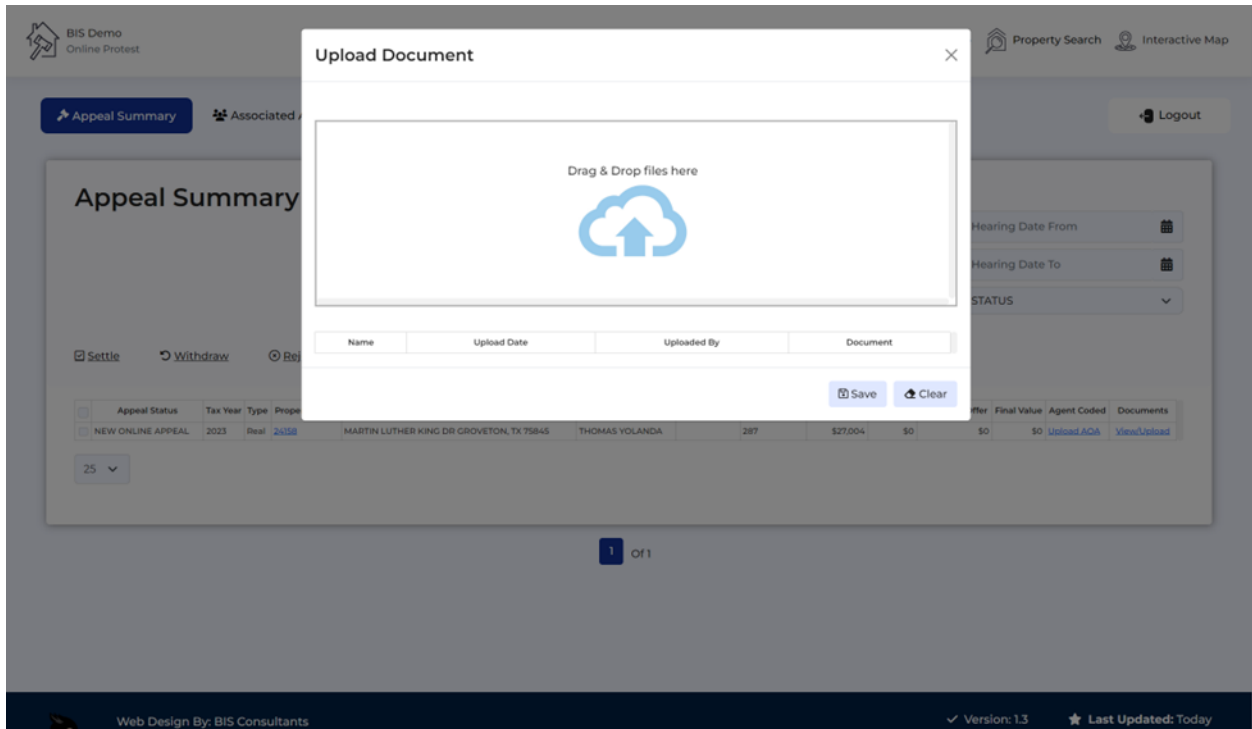
The screenshot shows the 'Appeal Summary' interface. At the top, there are navigation tabs: 'Appeal Summary', 'Associated Agents', 'Property Search', and 'AOA Maintenance'. The user is logged in as 'BIS Demo Online Protest'. The main content area has a search bar for 'Property ID' and filters for 'Hearing Date From', 'Hearing Date To', and 'STATUS'. There are buttons for 'Settle', 'Withdraw', 'Reject Offer', and 'Export Data'. Below the filters is a table of appeals. The table has columns for 'Appeal Status', 'Tax Year', 'Type', 'Property ID', 'Property Address', 'Property Owner', 'Hearing Date', 'Case Number', 'Notice Value', 'CAD Offer', 'CAD Final Offer', 'Final Value', 'Agent Coded', and 'Documents'. The table shows 1 record with a status of 'NEW ONLINE APPEAL'.

Appeal Status	Tax Year	Type	Property ID	Property Address	Property Owner	Hearing Date	Case Number	Notice Value	CAD Offer	CAD Final Offer	Final Value	Agent Coded	Documents
NEW ONLINE APPEAL	2023	Real	24758	MARTIN LUTHER KING DR GROVETON, TX 75845	THOMAS YOLANDA		287	\$27,004	\$0	\$0	\$0	Upload AOA	View/Upload

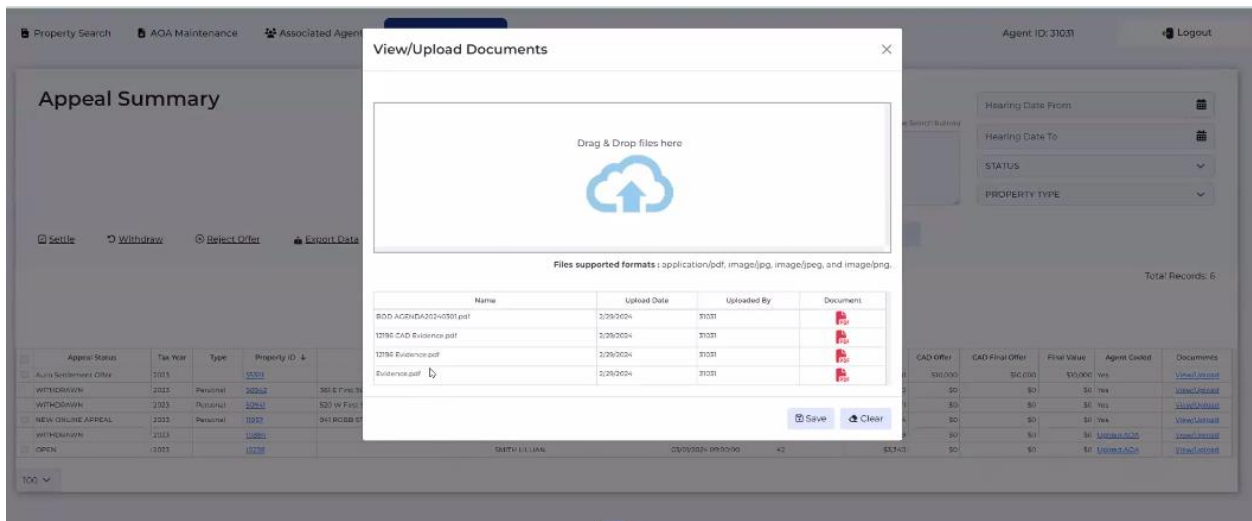
Agent Instructions

Evidence

The Agent can upload evidence for individual appeals by selecting “View/Upload” in the Documents column.



CAD evidence and Agent uploaded evidence will be displayed in the View/Upload Documents section.



Agent Instructions

Withdraw/Settle/Reject

To withdraw appeals, select the appeals that you want to withdraw and click the “Withdraw” link on the top of the grid.

Appeal Summary

Settle **Withdraw** Reject Offer Export Data

<input type="checkbox"/>	Appeal Status	Tax Year	Type	Property ID ↓	Property Address	
<input type="checkbox"/>	WITHDRAWN	2023		56421		CAB EAST
<input type="checkbox"/>	WITHDRAWN	2023		56420		CAB EAST
<input type="checkbox"/>	WITHDRAWN	2023		56419		CAB EAST
<input type="checkbox"/>	WITHDRAWN	2023		55330		CAB EAST
<input type="checkbox"/>	WITHDRAWN	2023		55328		CAB EAST
<input type="checkbox"/>	NEW ONLINE APPEAL	2023		54803		HIGGINBOTHAM
<input type="checkbox"/>	NEW ONLINE APPEAL	2023	Personal	54793	315 E CAROLINE ST TRINITY, TX 75862	TRINITY REHA
<input type="checkbox"/>	NEW ONLINE APPEAL	2023		54788		RED BALL OXY
<input type="checkbox"/>	NEW ONLINE APPEAL	2023		54787		RED BALL OXY
<input type="checkbox"/>	WITHDRAWN	2023		53504		CAB EAST
<input type="checkbox"/>	WITHDRAWN	2023		51815		VON BOTHME
<input type="checkbox"/>	NEW ONLINE APPEAL	2023		51810		OWEN ANN D
<input type="checkbox"/>	WITHDRAWN	2023		42421		CAB EAST
<input type="checkbox"/>	NEW ONLINE APPEAL	2023		31210		JOHNSON JOE
<input type="checkbox"/>	NEW ONLINE APPEAL	2023	Real	30878	RUSH CREEK LN TRINITY, TX 75862	MCDONALD K
<input type="checkbox"/>	WITHDRAWN	2023	Real	30877	RUSH CREEK LN TRINITY, TX 75862	MCDONALD K
<input type="checkbox"/>	WITHDRAWN	2023		29798		JOYCE KEVIN
<input type="checkbox"/>	WITHDRAWN	2023		29774		THOMAS GAR

When there is a settlement offer, the amount will be displayed under the CAD offer section.

The screenshot shows the BIS Demo Online Protest interface. At the top, there are navigation links for Home, Property Search, and Interactive Map. Below that, there are tabs for Appeal Summary, Associated Agents, Property Search, and AOA Maintenance, along with a Logout button. The main content area is titled "Appeal Summary" and contains a search form with fields for Property ID, Hearing Date From, Hearing Date To, and STATUS. Below the search form, there are buttons for Search and Clear. A table of appeals is displayed below, with columns for Appeal Status, Tax Year, Type, Property ID, Property Address, Property Owner, Hearing Date, Case Number, Notice Value, CAD Offer, CAD Final Offer, Final Value, Agent Coded, and Documents. The CAD Offer column for the first row is highlighted with a red box, showing a value of \$25,000. At the bottom of the page, there is a footer with the text "Web Design By: BIS Consultants", "Version: 1.3", and "Last Updated: Today".

Agent Instructions

The Agent will have the ability to settle/reject offers individually or in bulk.

To reject offers, select the offers that you want to reject and click the “Reject” link at the top of the grid.

The screenshot shows a web application interface with a 'Reject Offer' modal window. The modal contains the following text and table:

Are you sure that you want to reject the offer for the following properties?

Property ID	Property Address	Notice Value	Offer
35470	1516 WINDING CREEK DR TRINITY, TX 75862	\$103,697	\$97,500

Reject Disclaimer to be customized by CAD.

Confirm

The background shows an 'Appeal Summary' page with a table of appeals:

Appeal Status	Tax Year	Type	Property ID	Property Address	Property Owner	Hearing Date	Case Number	Notice Value	CAD Offer	CAD Final Offer	Final Value	Agent Coded	Documents
WITHDRAWN	2023	Real	05865	1630 JOSSERAND RD GROVETON, TX 75845	THOMAS JERRY		294	\$2,813	\$0	\$0	\$0	Yes	Upload ADA View/Upload
NEW ONLINE APPEAL	2023	Real	01459	15746 N HWY 94 APPLE SPRINGS, TX 75926	BROADSTONE FDS PORTFOLIO I LLC		293	\$522,389	\$0	\$0	\$0	Yes	View/Upload
NEW ONLINE APPEAL	2023	Real	35470	1516 WINDING CREEK DR TRINITY, TX 75862	THOMAS STEPHEN CURTIS		295	\$103,697	\$97,500	\$97,500	\$97,500	Yes	Upload ADA View/Upload

To settle offers, select the offers that you want to settle and click the “Settle” link on the top of the grid.

Once there is a final offer made at the CAD, the final offer will be displayed on the grid. At that time, you can choose to settle, withdraw, or reject the offer. A pop-up window will appear to confirm, click confirm if your selection is correct. The status will reflect the status chosen.

The screenshot shows a web application interface with a 'Settlement' modal window. The modal contains the following text and table:

Are you sure that you want to settle for the following properties?

Property ID	Property Address	Notice Value	Offer
35470	1516 WINDING CREEK DR TRINITY, TX 75862	\$103,697	\$97,500

Settle Disclaimer to be customized by CAD.

Confirm

The background shows the same 'Appeal Summary' page as in the previous screenshot, with the 'Settle' button highlighted in the top navigation bar.

Agent Instructions

Scheduled Hearing

If a hearing date is by the CAD a hearing date will be shown on the grid.

Appeal Summary

Property ID (paste comma separated list of Property IDs, and click the Search button)

Hearing Date From

Hearing Date To

STATUS

PROPERTY TYPE

Settle Withdraw Reject Offer Export Data

Q Search Clear

Total Records: 6

Appeal Status	Tax Year	Type	Property ID	Property Address	Property Owner	Hearing Date	Case Number	Notice Value	CAD Offer	CAD Final Offer	Final Value	Agent Coded	Documents
Auto Settlement Offer	2023		10301		MILLER LINDA L		525	\$15,481	\$10,000	\$10,000	\$10,000	Yes	View/Revoke
WITHDRAWN	2023	Personal	10262	381 E FIVE ST, TX	REDBOX AUTOMATED RETAIL LLC		19	\$0	\$0	\$0	\$0	Yes	View/Revoke
WITHDRAWN	2023	Personal	10261	520 W FIVE ST, GROESBECK, TX 75845	REDBOX AUTOMATED RETAIL LLC		21	\$8,371	\$0	\$0	\$0	Yes	View/Revoke
NEW ONLINE APPEAL	2023	Personal	10277	941 ROBB ST TRINITY,	MOVIE GALLERY US LLC		23	\$82,024	\$0	\$0	\$0	Yes	View/Revoke
WITHDRAWN	2023		10285		SMITH JAMES M & JANICE		22	\$16,079	\$0	\$0	\$0	Yes	View/Revoke
OPEN	2023		10339		SMITH LILLIAN	20230220-20230224	42	\$3,140	\$0	\$0	\$0	Yes	View/Revoke

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AOA Maintenance

Agents can use the AOA maintenance page to upload and revoke AOA's.

Accounts coded to the agent will be displayed and the status will be "CODED". Agents can search for PIDs that are not coded to them.

AOA Maintenance

Quick Ref ID (paste comma separated list of Quick Ref IDs, and click the Search button)

Quick Ref ID

Export to CSV AOA Maintenance Log

Q Search Clear

Add AOA for Selected Properties Revoke AOA

Search here...

Quick Ref ID	Status	Owner Name	Property Address	Agent ID	Agent Name	Effective Date	Expiration Date
54242	CODED			643252	HALL & ASSOCIATES CPA	2/16/2024	
33641	CODED		342 LEE RD APPLE SPRINGS, TX 75926	643252	HALL & ASSOCIATES CPA	4/2/2024	
33085	CODED			643252	HALL & ASSOCIATES CPA	2/26/2024	2/29/2024
31288	CODED			643252	HALL & ASSOCIATES CPA	2/26/2024	10/15/2024
22582	CODED	FIRST AMERICAN CAPITAL FUNDING	N SUNFISH LN TRINITY, TX 75862	643252	HALL & ASSOCIATES CPA	4/2/2024	
21764	CODED	HENDREN TAMMY J	WENDY LN TRINITY, TX 75862	643252	HALL & ASSOCIATES CPA	3/28/2024	
20654	CODED	FAWCETT JAMES R & LINDA		643252	HALL & ASSOCIATES CPA	4/2/2024	
13818	CODED	WALLER PAMELA	N WALNUT DR TRINITY, TX 75862	643252	HALL & ASSOCIATES CPA	2/27/2024	2/29/2024

100

To file one or multiple AOA's, they can select the accounts and click "Add AOA for Selected Properties".

Agent Instructions

AOA Submission

Agent ID: 643252


Submission Date: 04/05/2024

Effective Date: Expiration Date:

Authorities: Appeal Confidential Resolve Other

Mail Types: ARB Documents Chief Appraiser Documents Entity Tax Bill and Notices

AOA Images:

Drag & Drop files here


This is the disclaimer description for AOA application.

Quick Ref ID	Geographic ID	Type	Neighborhood	Address	Owner Name	Appraised Value	AOA Image
56734		Real	(SGRE) GROVETON E1	1179 S THORNTON RD TX		\$609,423.00	<input type="button" value="Choose File"/> <input type="button" value="No file chosen"/>

To revoke AOA's in mass select the properties and click "Revoke AOA".

Revoke AOA

The AOA on following will be revoked as of **04/05/2024**. Are you sure ?

Quick Ref ID	Owner Name	Property Address
54242		

Following properties doesn't have AOA coded 56734

AOA Maintenance

Agents can review and download a list of all the accounts they are coded to.

	Quick Ref ID ↓	Status	Owner Name	Property Address	Agent ID	Agent Name
<input checked="" type="checkbox"/>	54242	CODED			643252	HALL & ASSOCIATES CPA
<input type="checkbox"/>	33641	CODED		342 LEE RD APPLE SPRINGS, TX 75926	643252	HALL & ASSOCIATES CPA

Associated Agent

Agents can choose to add an associated agent if they would like to allow an associate to use the portal.

Agents will click add associated agent in the associated agent tab, enter their agent ID and PIN, click validate, agree to the terms, then click associate agent.

Agent Instructions

The image shows a web application interface with a modal window titled "Associate Other Agents". The modal contains the following elements:

- Input fields for "Agent id *", "PIN *", and "Name *".
- A blue "Validate" button.
- A scrollable text area containing a disclaimer: "This is a scrollable terms and condition block. Welcome to The Associated Agent End User Agreement. The Registration is for adding an associated Agent in this application that allows users who have created an account with us ["Members"] to post comments on contributions/articles and to receive newsletters through email subscriptions. Your acceptance of these Terms. By using, visiting, accessing and/or registering with The Register's website ("Website") (including all content available through this Website), you have read, understood and agree to be bound by these Terms and the terms and conditions of our privacy policy which can".
- A checkbox labeled "I agree to the terms and conditions.".
- An "Associate Agent" button at the bottom right of the modal.

The background application shows a navigation menu with "Property Search", "AOA Maintenance", and "Associated Agents". The main content area is titled "Associated Agents" and includes a table with columns for "Agent id" and "Name". A "100" dropdown menu is visible at the bottom left of the table area.