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Overview

Online Agent Services (OAS) is a proprietary application developed by the Harris County Appraisal District as a service to registered agents.

The use of this application by any unauthorized individual or company is strictly forbidden.

Any attempt to circumvent security protocols or access data not within the scope of an agent’s authority is strictly forbidden. Such attempts violate the Agent’s agreement with HCAD on the use of this application and can result in, but are not limited to, the revocation of the agent’s rights to use this application.

A logon ID and password are required. Further information on this can be found later in this documentation.

The following services are available free of charge:

- **Renditions and Extension Requests**
  You may file renditions and extension requests using the HCAD iFile System on personal property accounts for which rendition is required by law and for which you have active fiduciary on file with HCAD indicating powers to receive confidential information. Rendition and extension request availability is subject to statutory deadlines.

- **Rendition Print Options**
  You may specify whether or not HCAD will print renditions for all accounts on which the selected agent number has active fiduciary. Renditions for property types that cannot be rendered via Online Agent Services will be printed.

- **Value Protest and Hearing Information**
  You may file value protests online for accounts for which you have an active fiduciary on file with HCAD indicating protest powers. You may also review informal meeting dates, formal ARB hearing dates, and the status of protested accounts. A link to hearing evidence HCAD plans to use in a value hearing will become available at least 14 days before the scheduled date of the ARB hearing.

- **HCAD Informal Meeting Sets and ARB Formal Hearing Dockets**
  HCAD informal meeting dates and evidence, for which the informal meeting deadline has not yet passed, are available by selecting option “HCAD Informal Meeting Sets” from the “Home: Main Menu” page. Sets containing hearings on accounts for which you have protested or have an active fiduciary are displayed. Click the set number to view accounts within the set. If you have fiduciary on an account, hearing evidence is available by clicking the folder icon to the left of the account number.

  Once the deadline for completing an informal meeting has passed, unsettled hearings are recombined into hearing dockets for the formal hearing date. Hearing docket information is available by selecting option “ARB Formal Hearing Dockets” on the “Home: Main Menu” page.

- **Request Informal No Change or Withdrawal**
  You can request an “Informal No Change” or withdraw a protest or hearing for accounts for which you have an active fiduciary on file with HCAD. If the account has multiple protests you cannot use OAS to request an “Informal No Change” or withdraw the protest but must submit a written request for withdrawal.

- **Agent Download Files**
  Agent download files are updated on a daily basis during weekdays. The refreshed files are usually available by 8:00 AM. Account information including noticing, protest, hearing/docket, and rendition information is available for tax years 2006 and forward.

  Instructions for downloading agent files and helper applications are available. You can find further information when you access this service of Online Agent Services
Logon

For security reasons Online Agent Services requires a logon ID (Agent #) and a password. HCAD will set up the initial password for the Agent #, but HCAD urges each agent representative to change the initial password to something only they know. Once this is done, HCAD does not have the ability to look up your password.

If you have forgotten your password, click on the “Forgot Your Password?” link located in the upper right section of the page. You will be taken to the “Reset Password” page (see page 6).

For added security Online Agent Services monitors your activity. When OAS has determined that your session has been inactive for specified number of minutes (see Logon page) a pop-up message will appear (see below) that will give you the opportunity to “Continue” working. If you do not respond within the warning period (see Logon page) OAS will force you to log off.

At logoff, anything you have not completed such as protesting an account(s) will be lost. You will have to log back on to OAS and start the process again. As long as you are moving around within OAS you can remain on as long as you desire. It is only when you stop doing anything within OAS that the inactivity countdown begins.
About - Documentation

About: Online Agent Services

Online Agent Services (OAS) is a proprietary application developed by the Harris County Appraisal District as a service to registered agents. Additional documentation can be found at OAS V2.

Use of this application by any unauthorized individual or company is strictly forbidden.

Any attempt to circumvent security protocols or access data not within the scope of an agent’s purview is strictly forbidden. Such attempts violate the Agent’s agreement with HCAD on the use of this application and can result in, but is not limited to, the revocation of the agent’s rights to use this application.

A login and password are required. Your login is your 5-digit HCAD agent number with leading zeros. If you have registered more than one agent number with HCAD, your login is generally the lowest-numbered agent number. For example, if your HCAD agent numbers are 1 and 3, your login is 00001. Your password was indicated on the Agent Signup Sheet or in the email you received after HCAD created your Online Agent Services account. Contact information is located at the end of this message if you need further information.

Forgot your password?

If you do not remember your password, you can reset it by clicking the Forgot Password link in the upper right corner of the screen when you are on the Logon page. When you use this functionality, a new password will be generated automatically and sent to the email address on file for the Agent Number specified. After you have logged onto Online Agent Services with that new randomly generated password, you are encouraged to change it to anything you prefer by clicking on the My Account link in the top right corner of the screen.

My account

Any time you are logged onto Online Agent Services you can change your password to anything you prefer by clicking on the My Account link in the top right corner of the screen. An email will be sent to the email address on file for your Agent Number confirming the password change took place. For security reasons, the email will not contain the password you selected. That password is encoded within HCAD’s security database and only you will know it.

Available services

The following services are available free of charge:

1. eDocuments Enrollment and View eDocuments:
   - For agents that enroll in eDocuments, paper copies of “Notice of Value”, “Hearing Notice”, and “ARI Determining Order” will no longer be mailed to the agent. Agents will use the “View Documents” selection to see the documents and/or they can use their own FTP software to download the documents from HCAD’s FTP site. An agent must be enrolled in eDocuments before HCAD creates eDocuments and before your eDocuments are available via FTP. HCAD does not place files on the FTP site for your agency until after you have enrolled in eDocuments and after HCAD has a processing run that includes documents for your agency.

2. Renditions and Rendition Extension Requests:
   - You may file renditions and rendition requests using the HCAD File System on personal property accounts for which rendition is required by law and for which you have active fiduciary on file with HCAD indicating powers to receive confidential information. Rendition and extension request availability is subject to statutory deadlines.

3. Rendition Print Options:
   - You may specify whether or not HCAD will print renditions for all accounts on which the selected agent number has active fiduciary. Renditions for property types which cannot be rendered via Online Agent Services will be printed.

4. Value Protest and Hearing Information:
   - You may file value protests online for accounts for which you have an active fiduciary on file with HCAD indicating protest powers. You may also review informal meeting dates, formal ARI hearing dates, and the status of protested accounts. A link to hearing evidence HCAD plans to use in a value hearing will become available at least 14 days before the scheduled date of the ARI hearing.

5. HCAD Informal Meeting Sets and ARI Formal Hearing Dockets:
   - HCAD informal meeting dates and evidence for which the informal meeting deadline has not yet passed are available by selecting option “HCAD Informal Meeting Sets” from the “Home: Main Menu” page in the “AVAILABLE SERVICES” section. Sets containing hearings on accounts for which you have protested or have active fiduciary are displayed. Click the set number to view accounts within the set. If you have fiduciary on an account, hearing evidence is available 14 days prior to the hearing date by clicking the folder icon to the left of the account number.
   - Once the deadline for completing an informal hearing has passed, unoffered hearings are recombined into hearing dockets for the formal hearing date. Hearing docket information is available by selecting option “ARI Formal Hearing Dockets” under “Available Services” on the main menu page.

6. Request Informal No Change or Withdrawal of Protest or Hearing:
   - You can request an “Informal No Change” or withdraw a protest or hearing for accounts for which you have an active fiduciary on file with HCAD. If the account has multiple protests you cannot use OAS to request an “Informal No Change” or withdraw the protest but must submit a written request.

7. Agent Download Files:
   - Agent download files are updated on a daily basis during weekdays, and the updated files are usually available by 8:00 AM. Account information including noticing, protest, hearing, docket, and rendition information is available for tax years 2000 and forward.
   - There can be up to three files in a given tax year for each agent:
     - [Agent#]_FID_Accounts [TaxYear].txt: Account info for all accounts on which fiduciary has been recorded.
     - [Agent#]_FID_Ars [TaxYear].txt: Account info for all accounts on which an ARI hearing date is recorded.
     - [Agent#]_PRI_Ars [TaxYear].txt: Account info on accounts protected by fiduciary recorded on record file for agent.

Download Instructions and Helper Applications

Skeleton Microsoft Access 2000 database and Excel 2000 spreadsheets are available to import agent download files. You may access the helper applications by clicking the link “Download Instructions and Helper Applications” at the top of the Agent Download Page.

If you have additional questions regarding HCAD Online Agent Services, please contact the agent section at 713-812-5538.

Thank you for registering with the Harris County Appraisal District and for using Online Agent Services.

Most, but not all, screens have an “About” link in the banner section of the screen. Clicking on this link will open this screen in a separate browser window.

This screen gives a summary of some of the documentation. More detailed documentation (the document you are currently reading) can be found by clicking on the OAS-V2 link found on the line immediately after the “ABOUT: ONLINE AGENT SERVICES” heading.
Various forms available to the public are conveniently made available via Online Agent Services by clicking on the Forms link located in the banner of most screens.

Use the back arrow button (top left area of window) to return to OAS.
Forgot Password

The "Forgot Password" functionality (Reset Password) will generate a new random password and email it to you at the email address HCAD has on record for the Agent Number.

The security question will appear after you enter the Agent Number and move the cursor to the Security Answer box. You must know the answer to the security question for this functionality to work. The initial question and answer was provided to you by HCAD, via an email, when your Agent number was set up on OAS V2. Once changed by the agent, the password, the security question, and the security question answer are not retrievable by HCAD.
**Home: Main Menu**

This is the home page or main menu for Online Agent Services. You can get to this page from any other page within this application by clicking on the Home link in the banner for each page or by clicking on the Home button found at the bottom of each page.

Pressing the “?” mark after “FEATURES AND ENHANCEMENTS” or “AVAILABLE SERVICES” will take you to help menus (see below). These will be updated as needed.

The “Agent #” will be filled in with the primary agent number for your company. If your company has multiple agent numbers, the drop down list will show them.

If you are interested in information for a particular account you can enter the account number (or beginning portion) in the “Account Like (Opt.)” field. When you select a service that allows account number filtering you will only see the information for the selected account(s).

Select a service and click on “View Information”.

The “eDocuments Enrollment” radio button will take you through the steps necessary to enroll in eDocuments. See the index at the start of this documentation to find the section on eDocuments for more information.

The “View eDocuments” radio button (and associated functionality) is only selectable if you are enrolled in eDocuments. Select “eDocuments Enrollment” to enroll.
New Features

FEATURES

- You can now change your password and update your email address, phone number, and security question/answer. Click on “My Account” link on the “Home: Main Menu” page.

- To reschedule a hearing, fill out the “Appraisal Review Board Agent Request to Reschedule Hearing” form (form number “ARB_AGT_RCH.pdf”), which can be found on the “Forms” link above in the “Other Forms” section.

- Additional forms, such as the “Appointment of Agent For Property Taxes” (form number 50-162), can also be found on the “Forms” link above.

- In the “Informal Hearing Sets” and “ARB Formal Hearing Dockets” you can view prior years. Specify the “Tax Year” on the “Home: Main Menu” prior to going to either of those screens. In addition to “Value” information, HCAD now includes “Corrections”, “Exemptions” and “Other”.

- The “eDocuments Enrollment” selection on the “Home: Main Menu” screen allows the agent to specify the receipt of “ARB Determination Order”, “Hearing Notice”, and “Notice of Value” documents electronically instead of by mail.

- The “View eDocuments” selection on the “Home: Main Menu” screen allows the agent to view the documents HCAD has made available via the eDocuments functionality.

ENHANCEMENTS

- Agents that have enrolled in eDocuments now have the ability to download their documents from HCAD’s FTP site. You will find a link for more information concerning FTP on the main menu under the “eDocuments Enrollment” button.

- The “Value Protest and Hearing Information” screen has been updated with a new column (H8 201) which allows you to request H8201 status for an account.

- The “Request Withdrawal of a Protest or Hearing” has been changed to “Request Informal No Change or Withdrawal”. The withdrawal functionality remains the same. HCAD has added the ability to request an “Informal No Change”.
Available Services

- Select the desired tax year and agent number.
- When going to Renditions and Extension Requests, Value Protest and Hearing Information, Request Informal No Change or Withdrawal, or View eDocuments, you may enter the first few digits of the account number to filter the list, if desired.
Change Password

Once you have successfully logged onto Online Agent Services, you can change your password and update your agent name, email address, phone number, and/or update your security question and answer. To do this click on “Change Password” in the upper right section of most screens. You will be taken to the screen you see above. There you can enter your old, new, and confirm password in order to change your password. You can also click on the “Update …” links to update the other items.

For a change in the name of your company, please call HCAD at 713-812-5858 and discuss this with someone in the Agent Support Group.

When you perform any of the functions listed above an email is generated and sent to the email address HCAD has on record for the agent number. For the “Update Email Address” the email is sent to both the old email address and to the new email address.

Online Agent Services (OAS) uses this email address for all automatically generated emails. It is the agent’s responsibility to ensure that HCAD has the email address for the person at your company tasked with monitoring communications between HCAD and your company.

HCAD does not monitor replies made by the agent to the email address in the automated emails.

You can click on the “Main Menu” button to return to the “Home: Main Menu” page or click on “LOG OUT” if you are ready to exit Online Agent Services.

NOTE: HCAD maintains an electronic copy of all emails generated by Online Agent Services.
Renditions and Extension Requests

You may file renditions and rendition extension requests via the HCAD Online Agent Services website on personal property accounts for which your fiduciary grants the authority to receive all communications from the chief appraiser. Web filing of rendition extension requests is available for all personal property types. Web filing of renditions is currently available to the following personal property types:

- General Personal Property
- Vehicles
- Stored Products
- Tank Farms (products inside tanks)
- Stored Pipe
- General Industrial Property
Filing Rendition Extension Requests

May 15th Extension

May 15th extensions may be filed up to the statutory filing deadline. May 15th extensions may be filed en-masse via Online Agent Services. Timely filed May 15th extension requests are automatically approved.

- Select option “Renditions and Extension Requests” from HCAD Online Agent Services and click “View Information”. A list of accounts for which renditions and/or rendition extensions is displayed. If you have fiduciary on many accounts, more than one page of accounts may exist.
- Check the box labeled “File May 15 Ext.” on each account. If you wish to file a May 15th extension for all accounts on the page, check the box labeled “File All” in the column heading “May 15 Ext Status” near the top of the page. You may only process one page of accounts at a time. If multiple pages exist, each page must be processed separately.
- Click the button “File May 15 Extension” at the bottom of the page. A confirmation page appears which lists each account for which an extension request has been selected. Click the button “Yes – Request May 15 Extension Request” to finalize the request or “No – Return to Account Selection” to make any changes.

**Extension requests must be finalized in order to be approved.** Failure to finalize extension requests may result in extension denial and rendition penalty assessment on accounts.

- A confirmation message will be displayed and a confirmation message will be emailed to you. If you do not receive a confirmation email, please verify the email address associated with your login and check your email spam filters. If your email address is correct and the confirmation message was not received, please contact HCAD.

Additional 15-Day Extension

If a May 15th extension request has been timely filed for a personal property account, an Additional 15-Day Extension request may be filed via Online Agent Services. Because good cause must be provided for an extension request of this type, requests must be filed individually.

- From the Renditions and Extension Requests page, click the link “iFile™ Request” for an account in the column labeled “Add’l 15-Day Status.”
- A new browser window will be launched in which the iFile™ Rendition Extension Request form is displayed. The form must be filled out in its entirety. Click “Continue” at the bottom of the form to go to the confirmation page. Click “Submit My Rendition Extension” to finalize the request.

**Extension requests must be finalized in order to be processed.** Failure to finalize an extension request may result in extension denial and rendition penalty assessment on accounts.

- A completed additional 15-day extension request will be displayed and a confirmation message will be emailed.
Renditions

iFile™ renditions may be filed via Online Agent Services on accounts for which you have proper fiduciary and are currently available for iFile™ rendition. To ensure that iFile™ data matches the data provided in paper rendition packets, iFile™ is only available to accounts where the rendition has been marked as printed.

- From the Renditions and Extension Requests page, click the line “iFile™” for an account in the column labeled “Rendition Status”.
- A new browser window will be launched in which the iFile™ Rendition form is displayed.
- Complete the rendition using the buttons at the bottom of the page to navigate from page to page. The Signature form must be completed in its entirety in order to finalize the rendition. Notary may be required as well.
- Finalize the rendition by clicking the button “Submit Rendition” at the bottom of the Summary Page. A confirmation message will be emailed and the Summary page will be re-displayed with a link allowing the rendition to be printed for your records.
Rendition Print Options

**Changes made after April 1 will have no effect on the current tax year.**

<table>
<thead>
<tr>
<th>Rendition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>HCAD will print renditions for all accounts on which the selected agent has active fiduciary.</td>
</tr>
<tr>
<td>Do Not Print</td>
<td>HCAD will not print renditions forms for accounts on which the selected agent has active fiduciary.</td>
</tr>
</tbody>
</table>

Conditions for property types which cannot be rendered via Online Agent Services will be printed.

You may opt into or out of rendition print for accounts on which you have fiduciary. This option only applies to accounts of property types which can be rendered via iFile™. Rendition packets continue to print for all other property types, regardless of the option selected here.

Changes to Rendition Print Options have no effect after April 1. Any changes made after that time will be applied to the next tax year.
To protest an account:

- Under the “Protest” column select one of the radio buttons next to the account that represents the type of protest you want to make (I.E. Mkt, UA, or Both).
  - If radio buttons do not appear it is because:
    1. The account has already been protested (see column “Protested”).
    2. The time for protesting the account has expired (see column “Noticed”, you have 30 days from this date).
- When the protest radio buttons are visible, the “HB 201” check box is not enabled until one of the protest radio buttons are selected.

The “HB 201” column check box:

- If the check box is checked then the account is currently under HB 201 restrictions.
- If the check box is not enabled (I.E. you cannot check or uncheck the checkbox) then
  1. See second bullet point under “To protest an account” above.
  2. The time has expired for you to make a change. Examples include:
     - The account was not protested timely.
     - The account is within 14 days of a formal hearing.
     - The formal hearing has occurred.
     - The account has been settled (see Status column).
  3. You have already made a change via Online Agent Services (OAS). Another change is not allowed by OAS and you must contact Agent Services if you desire to make a change.
Filtering and Protesting

Large Number of Accounts

Some agents have a considerable number of accounts for which they have fiduciary authority. For those agents, to ensure quick response time from OAS, an initial warning screen is displayed which will allow the agent to filter the data before OAS attempts to return all accounts. If the agent does not want to filter the data then click on “Apply Filter” without specifying any additional filtering parameters.

Filtering Options

If you only want to view accounts that are available for protesting then select “Protestable Accounts Only” from the “Protest” column of the “Filter” then click on “Apply Filter”.

You can also filter by:

- agent number, if you have multiple agent numbers assigned.
- Account number
- Owner

To clear all filtering click on the “Clear Filter” button.
You may file value protests and review the evidence HCAD intends to present in a value hearing on real and personal property accounts for which your fiduciary grants the authority to file notices of protest and present protests before the appraisal review board. Other information available from this page includes:

- 25.19 Notice Status: Notice date and value, hold status
- Hearing information: Informal meeting and formal hearing scheduled dates, hearing status (i.e. pending, settled, release date), and docket information

The contents of this page can be filtered to show “Protestable Accounts Only”. Additionally, if more than one agent number is accessible by your login, the appropriate agent number may be selected. It is also possible to filter this page by partial account number and by partial owner name. To clear all filter values click on “Clear Filter”.

---

**HCAD Online Agent Services (OAS)**

**Online Agent Services**

**2014 Online Protests and Value Hearings - Agent**

<table>
<thead>
<tr>
<th>Protest Account</th>
<th>Account Owner</th>
<th>SI On Hold</th>
<th>Noticed</th>
<th>Protected</th>
<th>Docket</th>
<th>Informal</th>
<th>Formal</th>
<th>Status</th>
<th>Released</th>
<th>Appraised</th>
<th>Market</th>
</tr>
</thead>
<tbody>
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**Filter**

- Protect
- Account
- Owner
- SI On Hold
- Noticed
- Prototed
- Docket
- Informal
- Formal
- Status
- Released
- Appraised
- Market

**Filter Record Count:** 1

**Rows per page:** 20

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**Processing as Harris County Appraisal District**

**Online Agent Services**

**2014 Online Protests and Value Hearings - Agent**

<table>
<thead>
<tr>
<th>Protest Account</th>
<th>Account Owner</th>
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</table>

**Filter**

- Protect
- Account
- Owner
- SI On Hold
- Noticed
- Prototed
- Docket
- Informal
- Formal
- Status
- Released
- Appraised
- Market

**Filter Record Count:** 1

**Rows per page:** 20

---

You may file value protests and review the evidence HCAD intends to present in a value hearing on real and personal property accounts for which your fiduciary grants the authority to file notices of protest and present protests before the appraisal review board. Other information available from this page includes:

- 25.19 Notice Status: Notice date and value, hold status
- Hearing information: Informal meeting and formal hearing scheduled dates, hearing status (i.e. pending, settled, release date), and docket information

The contents of this page can be filtered to show “Protestable Accounts Only”. Additionally, if more than one agent number is accessible by your login, the appropriate agent number may be selected. It is also possible to filter this page by partial account number and by partial owner name. To clear all filter values click on “Clear Filter”.

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Rev. 05/23/2017
Filing Protests
Value Protest – via Online Agent Services Website

Value protests may be filed up to the statutory filing deadline. Value protests may be filed en-masse via Online Agent Services. Protest options are available for an account if the statutory deadline has not yet passed or a value protest does not already exist for the account.

- Select option “Value Protest and Hearing Information” from HCAD Online Agent Services and click “View Information”. A list of accounts for which you have proper fiduciary are displayed. If you have fiduciary on many accounts, more than one page of accounts may exist.
- In the column labeled “Protest”, four options exist for each account that can be protested: NS (Not Selected), Mkt (Market), UA (Unequal Appraisal), and Both. Select the appropriate type of protest for each account. Selecting an option at the top of the list selects that option for all accounts on the page. After selecting the type of protest, the HB201 selection box will become enabled. You can check this box at this time if you want to request HB201 status for the account. If you have protested an account and then withdrawn that protest you will see, in this column, a “WD”, followed by a date. This is the date withdrawn. You cannot protest an account via OAS once you have withdrawn it. Contact the Agent Support Group for more information.
- Note: You may only process one page of accounts at a time. If multiple pages exist, each page must be processed separately.
- Once you have selected one or more accounts to protest a red, “Submit”, button and a green “Undo All On This Page”, button will appear at the top and the bottom of the list of accounts. Click the “Submit” button at either the top or bottom of the page if you have made your selections and are ready to submit them to HCAD. A confirmation page will then appear which lists each account for which a protest is to be filed. Click the button “Yes – Protest Selected Accounts” to finalize the protest or “No – Return to Account Selection” to make any changes.

Value protests must be confirmed in order to be processed. You must reply “Yes – Protest Selected Accounts” to submit your protests to HCAD. Unconfirmed protests are considered invalid, and no hearing will be scheduled.

- A confirmation message will be displayed and a confirmation message will be emailed to you. If you do not receive a confirmation email, please verify the email address associated with your login and check for spam filters. If your email address is correct and the confirmation was not received, please contact HCAD.
Value Protest – via Protest by Disk

Value protests may also be filed on disk. Value protests on disk are considered valid if the disk is received by the HCAD Agent Department on or before the statutory protest deadline for the accounts protested on the disk. Please see the table “Value Protest by Disk” at the end of this document for the correct filing format.

Hearing Evidence Availability

Hearing evidence is made available at least two weeks before the formal hearing scheduled date. Once evidence has been made available, the account number becomes a link. When clicked, a new browser window is launched and the Hearing Evidence page is displayed. All evidence files made available in Online Agent Services are of document type PDF.

Informal Hearing Sets and Formal Hearing Dockets Availability

A link to the informal hearing set or formal hearing docket is available for each account scheduled for a hearing in the column labeled “Docket”. Click the docket number to display the contents of the docket in a new browser window. Please see the section entitled “HCAD Informal Meeting Sets and ARB Formal Hearing Dockets” for more information.
HCAD Informal Hearing Sets and ARB Formal Hearing Dockets

Informal

The “Type” dropdown in the Filter allows for the specification of “Value”, “Exemption”, “Correction”, “Other”, and “Multiple”.

Entering “From” or “To” date only will default the other date to the same value.

If “From” date is after “To” date an error message will appear.

Formal

(Screen descriptions are on the next page.)
The “HCAD Informal Meeting Set List” displays all sets containing unresolved informal meetings on accounts for which you have active fiduciary or have filed a value protest. An informal set is no longer visible when all the meetings in the group have been settled or have been scheduled into formal hearing dockets.

The “ARB Formal Hearing Dockets” displays all dockets containing unresolved formal hearings on accounts for which you have active fiduciary or have filed a value protest. A formal docket is no longer visible when all the hearings in the docket have been settled.

Please note: If a group of accounts contain at least 1 account for which a formal hearing has been set, the entire group of accounts is treated as a formal group and will be found in the “ARB Formal Hearing Dockets” group.

The set/docket list on these pages consists of the following:

- **SET or DOCKET**: The set/docket id number
- **TYPE**: The Set List and Docket List consist of protests of the following type:
  - Value, Exemption, Correction, Other, and Multiple (meaning the list contains multiple types)
- **HCAD MEETING**: The earliest scheduled informal scheduled date and time for all hearings in the set or docket.
- **ARB HEARING**: The earliest scheduled formal scheduled date and time for all hearings in the set or docket.
- **FID**: The agent number of the fiduciary for all accounts in the set or docket. If more than one agent has fiduciary, the set is “Mixed”.
- **PRT**: The agent number of the protesting agent for all accounts in the set or docket. If more than one agent protested accounts in the set, it is considered “Mixed”.
- **CTR**: The hearing center for all accounts in the set or docket. “Multiple” is displayed if more than one hearing center exists in the set.
- **ACCTS**: The number of accounts in the set or docket.
- **STL**: The number of accounts in the set or docket that have been settled.
- **VALUE**: The total market value for all accounts in the set or docket.

**Filtering**

Available Types filtering values are:
Value, Exemption, Correction, Other, and Multiple

From and To dates (all actions are limited to the data available based on the tax year specified on the main menu):

<table>
<thead>
<tr>
<th>Specify</th>
<th>Apply Filter action</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>no date range limitations are placed on the data.</td>
</tr>
<tr>
<td>From only</td>
<td>the “To” date is calculated as the last day of the year associated with the “From” date.</td>
</tr>
<tr>
<td>To only</td>
<td>the “From” date is calculated as the first day of the year associated with the “To” date.</td>
</tr>
<tr>
<td>Both:</td>
<td>the data is limited to anything within the specified range.</td>
</tr>
</tbody>
</table>
Review Set or Docket
You may view the contents of a set or docket by clicking the set/docket number. All accounts in the set or docket are displayed. If you have fiduciary on an account, an icon is visible to the left of the account number which is a link to the hearing evidence page for the account. There is no evidence link available on accounts for which you do not have fiduciary.

Informal Meeting Set

The set/docket contents are as follows:

- **EVID**: A link to the hearing evidence, if applicable.
- **ACCOUNT**: The HCAD Account Number.
- **CTR**: The hearing center for the account.
- **HCAD Meeting**: The scheduled date and time for the informal meeting.
- **ARB Hearing**: The scheduled date and time for the formal hearing.
- **FID**: The agent number with active fiduciary on the account.
- **PRT**: The agent number of the protesting agent.
- **VALUE**: The current market value for the account.
- **CC**: The hearing conclusion code on the account. To view a complete list of HCAD conclusion codes, click the label “CC”.
- **STL**: “Y” indicates that this hearing is settled.
Request Informal No Change or Withdrawal

A protested account will not show up on this screen if it is within 3 days of its formal hearing. To Informal No Change or Withdraw this account you must contact the Agent Support Group at HCAD.

The “Informal No Change” (INC) and “Withdraw” (WD) check boxes are mutually exclusive. You can select one or the other, but not both.

You may request an “Informal No Change” or withdrawal of a protest, informal meeting, or formal hearing on any account for which your fiduciary grants the authority to file notices of protest and present protests before the appraisal review board.

The contents of this page can be filtered in several ways including: property type, account number (partial or whole), owner name, scheduled status, and set/docket number.

“Informal No Change” and “Withdrawal” requests may be made up to the withdrawal deadline as set by ARB policy for accounts with an active value protest, informal meeting, or formal hearing.

- From the “Home: Main Menu” screen select option “Request Informal No Change or Withdrawal” and click “View Information”. A list of accounts eligible for withdrawal is displayed. More than one page of accounts may exist.
- You may request an “Informal No Change” on individual accounts by clicking the appropriate checkbox. You may only process one page of accounts at a time. If multiple pages exist, each page must be processed separately.
- You may withdraw individual account protest requests by clicking the appropriate checkbox. You may only process one page of accounts at a time. If multiple pages exist, each page must be processed separately.
- Once you have selected one or more accounts a red button will appear at the places indicated (page 26).

See notes on the next page.
Note 1:
- The following descriptions may show up in the “Inf No Chg” (Informal No Change) and/or the “Withdraw” columns. Because of the limited space in these columns, only one of these descriptions can be displayed per account even if multiple descriptions apply. Therefore this list is also in the order of precedence should multiple descriptions apply to an account in a particular column.
  - “Multi-Protest” means that more than one protest appears on this account. These accounts cannot be “Informal No Change” or “Withdrawn” via OAS.
  - “Multi-Location” applies to personal property accounts and means the assets are spread out all over the county. These accounts cannot be settled with an “Informal No Change”.
  - “Ag Use” (Agriculture Use, example not shown) cannot be settled with an “Informal No Change”.
  - “NV Use” (Nominal Value, example not shown) cannot be settled with an “Informal No Change”.
  - “SV Use” (Special Value, example not shown) cannot be settled with an “Informal No Change”.

- Please contact the Agent Support group for more information and additional help.

Note 2: INC followed by a date indicates that your request has been processed through HCAD’s system. Within a week to 10 days from this date an Informal No Change letter will be available via View eDocuments and is listed as an “ARB Determining Order”.

Note 3: Prior to HCAD processing your request you will see “INC in process”. HCAD will normally process your request overnight.

Note 4: An account must be scheduled for either an informal or formal hearing before it is possible to request an Informal No Change (INC).
Click the red “Submit” button to start the process. A confirmation page appears which lists each account for which an “Informal No Change” or “Withdrawal” request was made. Click “Yes – Process Accounts Above” to finalize the request or “No – Return to Account Selection” to make any changes. “Informal No Change” and “Withdrawal” requests must be finalized in order to be processed.

A confirmation of submission will be displayed and an email message sent to you. If you do not receive a confirmation email, please verify the email address associated with your login and check your junk mail/spam folder and filters. If your email address is correct and the confirmation was not received, please contact HCAD.

Definitions of text you might see on the above page:

- **INC in process or WD in process** – this account was selected for “Withdrawal” or “Informal No Change” but processing at HCAD has not finalized the request. This process sometimes takes overnight.
- **Multi-Protest** – this account was protested by multiple agents and/or owners. You cannot request an “Informal No Change” or “Withdrawal” via Online Agent Services. You must submit a withdrawal request in writing.
- **INC date or WD date** – the protest for this account has been “Informal No Change” or “Withdrawal” as of the date shown. It cannot be protested again.
- **INC or WD** – this account is eligible for “Informal No Change” or “Withdrawal”.
- **Pnd Protest** – A protest has been submitted to HCAD but further processing at HCAD is required. You can withdraw this protest.
Agent Download Files

Download data files are available which can imported into a spreadsheet or database application to manage accounts on which you have active fiduciary. You may also track accounts for which you filed a value protest, but do not yet have fiduciary. All files are tab-delimited.

Available Download Files

- [Agent Number]_FID_Acct_[Tax Year].txt: This file contains information about all accounts for which an active fiduciary exists for the specified agent number and tax year.
- [Agent Number]_PRT_Acct_[Tax Year].txt: This file contains information about all accounts protested by the specified agent, but active fiduciary does not exist for the protesting agent. Once fiduciary has been recorded, accounts in this file will "move" to the FID file described above.
- [Agent Number]_FID_Jurs_[Tax Year].txt: This file contains active jurisdictions associated with each account in the FID file described above.
- [Agent Number]_EDOC_[Tax Year].txt: This file contains a list of all documents made available electronically by document date, tax year, fiduciary agent number, account number, and document type. Document date is the date printed on the document. Document type is “HN” (Hearing Scheduling Notice), “HR” (ARB Determination Order), and “NT” (Notice of Value). Only agents that have enrolled in eDocuments will have this file available.
- Microsoft Helper Files: Skeleton MS 2000 Excel spreadsheets are provided with formats matching the files above. An MS 2000 Access database is also provided with empty tables having schema matching the files above. Instructions to import the download files into these applications may be found by clicking the link "Download Instructions and Helper Applications" at the top of the Agent Download Files page.
File Definitions

Account File Definition

FID: Contains records for all active real and personal property accounts for which active fiduciary exists.
PRT: Contains records for all active real and personal property accounts on which a protest has been filed by an agent, but active fiduciary does not exist for the protesting agent.

<table>
<thead>
<tr>
<th>Element (column)</th>
<th>Data Type</th>
<th>Max Length</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX_YEAR</td>
<td>Numeric</td>
<td>4</td>
<td>Tax year for data within file</td>
</tr>
<tr>
<td>FID_AGENT_CODE</td>
<td>Text</td>
<td>6</td>
<td>HCAD agent number of active fiduciary</td>
</tr>
<tr>
<td>HCAD_ACCT</td>
<td>Text</td>
<td>13</td>
<td>HCAD Account Number</td>
</tr>
<tr>
<td>FID_AGENT_NAME</td>
<td>Text</td>
<td>100</td>
<td>Active fiduciary agent name</td>
</tr>
<tr>
<td>OWNER_NAME</td>
<td>Text</td>
<td>50</td>
<td>Property owner name</td>
</tr>
<tr>
<td>OWNER_ADDR_1</td>
<td>Text</td>
<td>40</td>
<td>Property owner mailing address line 1</td>
</tr>
<tr>
<td>OWNER_ADDR_2</td>
<td>Text</td>
<td>40</td>
<td>Property owner mailing address line 2</td>
</tr>
<tr>
<td>OWNER_ADDR_3</td>
<td>Text</td>
<td>40</td>
<td>Property owner mailing address line 3</td>
</tr>
<tr>
<td>OWNER_CITY_STATE</td>
<td>Text</td>
<td>40</td>
<td>Property owner mailing city and state</td>
</tr>
<tr>
<td>OWNER_ZIP_CODE</td>
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<td>10</td>
<td>Property owner mailing zip code</td>
</tr>
<tr>
<td>LOCATION_ST_NUMBER</td>
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<td></td>
<td>Property location street number</td>
</tr>
<tr>
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<td>Text</td>
<td>100</td>
<td>Property location street name</td>
</tr>
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<td>Property legal description line 1</td>
</tr>
<tr>
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<td>Text</td>
<td>50</td>
<td>Property legal description line 1</td>
</tr>
<tr>
<td>LEGAL_3</td>
<td>Text</td>
<td>50</td>
<td>Property legal description line 3</td>
</tr>
<tr>
<td>LEGAL_4</td>
<td>Text</td>
<td>50</td>
<td>Property legal description line 4</td>
</tr>
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<td>PROTEST_POWER</td>
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<td>1</td>
<td>“X” indicates agent has general powers to represent in property tax matters</td>
</tr>
<tr>
<td>INFO_POWER</td>
<td>Text</td>
<td>1</td>
<td>“X” indicates agent</td>
</tr>
<tr>
<td>NEGOTIATE_POWER</td>
<td>Text</td>
<td>1</td>
<td>“X” indicates agent has power to negotiate and resolve disputed tax matters</td>
</tr>
<tr>
<td>SPECIAL_POWER</td>
<td>Text</td>
<td>1</td>
<td>“X” indicates agent has power not described on State of Texas Appointment of Agent form</td>
</tr>
<tr>
<td>OCA_INFO_POWER</td>
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<td>1</td>
<td>“X” indicates agent will receive all communications from the chief appraiser</td>
</tr>
<tr>
<td>Field</td>
<td>Type</td>
<td>Length</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------</td>
<td>--------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ARB_INFO_POWER</td>
<td>Text</td>
<td>1</td>
<td>&quot;X&quot; indicates agent will receive all communications from the ARB</td>
</tr>
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<td>STATE_CLASS</td>
<td>Text</td>
<td>2</td>
<td>Property state class code</td>
</tr>
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<td>Text</td>
<td>2</td>
<td>Personal property type code</td>
</tr>
<tr>
<td>IC_CODE</td>
<td>Text</td>
<td>1</td>
<td>No longer used</td>
</tr>
<tr>
<td>SPECIAL_CODE</td>
<td>Text</td>
<td>1</td>
<td>No longer used</td>
</tr>
<tr>
<td>SIC_CODE</td>
<td>Text</td>
<td>5</td>
<td>Personal property standard industrial classification code</td>
</tr>
<tr>
<td>LAND_AREA</td>
<td>Numeric</td>
<td></td>
<td>Real property land area in square feet</td>
</tr>
<tr>
<td>PTS_FLAG</td>
<td>Text</td>
<td>1</td>
<td>&quot;X&quot; indicates account is on HCAD problem tracking system. (prevents notice and certification)</td>
</tr>
<tr>
<td>BPS_FLAG</td>
<td>Text</td>
<td>1</td>
<td>&quot;X&quot; indicates account has open permit on HCAD building permit system</td>
</tr>
<tr>
<td>PRIOR_RENDERED</td>
<td>Numeric</td>
<td></td>
<td>Prior year rendered value</td>
</tr>
<tr>
<td>PRIOR_MARKET_LAND</td>
<td>Numeric</td>
<td></td>
<td>Prior year real property land market value</td>
</tr>
<tr>
<td>PRIOR_MARKET_IMP</td>
<td>Numeric</td>
<td></td>
<td>Prior year real property improvement and extra features market value</td>
</tr>
<tr>
<td>PRIOR_AG</td>
<td>Numeric</td>
<td></td>
<td>Prior year real property agricultural value</td>
</tr>
<tr>
<td>PRIOR_PERSONAL</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property total value</td>
</tr>
<tr>
<td>PRIOR_PERS_INVENTORY</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property inventory value</td>
</tr>
<tr>
<td>PRIOR_PERS_CONSIGN</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property consignment value</td>
</tr>
<tr>
<td>PRIOR_PERS_RAW</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property raw materials value</td>
</tr>
<tr>
<td>PRIOR_PERS_WIP</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property work in process value</td>
</tr>
<tr>
<td>PRIOR_PERS_LEASEHOLD</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property leasehold value</td>
</tr>
<tr>
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<td></td>
<td>Prior year personal property machinery value</td>
</tr>
<tr>
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<td></td>
<td>Prior year personal property furniture value</td>
</tr>
<tr>
<td>PRIOR_PERS_MISC</td>
<td>Numeric</td>
<td></td>
<td>Prior year personal property miscellaneous value</td>
</tr>
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<td>Numeric</td>
<td></td>
<td>Prior year personal vehicle value</td>
</tr>
<tr>
<td>PRIOR_APPRAISED</td>
<td>Numeric</td>
<td></td>
<td>Prior year appraised value</td>
</tr>
<tr>
<td>CURRENT_RENDERED</td>
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<td></td>
<td>Current year rendered value</td>
</tr>
<tr>
<td>CURRENT_MARKET_LAND</td>
<td>Numeric</td>
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<td>Current year real property land market value</td>
</tr>
<tr>
<td>CURRENT_MARKET_IMP</td>
<td>Numeric</td>
<td></td>
<td>Current year real property improvement and extra features market value</td>
</tr>
<tr>
<td>Field</td>
<td>Type</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>------------------------</td>
<td>----------</td>
<td>------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>CURRENT_AG</td>
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<td>Current year real property agricultural value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERSONAL</td>
<td>Numeric</td>
<td>Current year personal property total value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERS_INVENTORY</td>
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<td>Current year personal property inventory value</td>
<td></td>
</tr>
<tr>
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<td>Numeric</td>
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<td></td>
</tr>
<tr>
<td>CURRENT_PERS_RAW</td>
<td>Numeric</td>
<td>Current year personal property raw materials value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERS_WIP</td>
<td>Numeric</td>
<td>Current year personal property work in process value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERSLEASEHOLD</td>
<td>Numeric</td>
<td>Current year personal property leasehold value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERS_MACHINERY</td>
<td>Numeric</td>
<td>Current year personal property machinery value</td>
<td></td>
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<tr>
<td>CURRENT_PERS_FURNITURE</td>
<td>Numeric</td>
<td>Current year personal property furniture value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERS_MISC</td>
<td>Numeric</td>
<td>Current year personal property miscellaneous value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_PERS_VEHICLE</td>
<td>Numeric</td>
<td>Current year personal vehicle value</td>
<td></td>
</tr>
<tr>
<td>CURRENT_APPRAISED</td>
<td>Numeric</td>
<td>Current year appraised value</td>
<td></td>
</tr>
<tr>
<td>NOTICE_DATE</td>
<td>Date</td>
<td>Value notice date – format MM/DD/YYYY</td>
<td></td>
</tr>
<tr>
<td>STATUS</td>
<td>Text</td>
<td>1 P – Pending, N – Noticed, C – Certified</td>
<td></td>
</tr>
<tr>
<td>PROTEST_DATE</td>
<td>Date</td>
<td>Value protest received date</td>
<td></td>
</tr>
<tr>
<td>HEARING_DATE_INF</td>
<td>Text</td>
<td>HCAD informal meeting date and time</td>
<td></td>
</tr>
<tr>
<td>HEARING_DATE_FML</td>
<td>Text</td>
<td>ARB formal hearing date and time</td>
<td></td>
</tr>
<tr>
<td>DOCKET</td>
<td>Numeric</td>
<td>Formal hearing docket number</td>
<td></td>
</tr>
<tr>
<td>HEARING_STATUS</td>
<td>Text</td>
<td>1 N – Not Scheduled, P – Pending, S – Settled</td>
<td></td>
</tr>
<tr>
<td>PROTEST_AGENT_CODE</td>
<td>Text</td>
<td>HCAD agent number of agent who filed value protest</td>
<td></td>
</tr>
<tr>
<td>HEARING_CONCLUSION</td>
<td>Text</td>
<td>2 Value hearing conclusion code</td>
<td></td>
</tr>
<tr>
<td>INFORMAL_SET</td>
<td>Numeric</td>
<td>HCAD informal set number</td>
<td></td>
</tr>
</tbody>
</table>
### Account Jurisdictions File Definition

<table>
<thead>
<tr>
<th><strong>Element</strong> (column)</th>
<th><strong>Data Type</strong></th>
<th><strong>Max Length</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX_YEAR</td>
<td>Numeric</td>
<td>4</td>
<td>Tax year for data within file</td>
</tr>
<tr>
<td>FID_AGENT_CODE</td>
<td>Text</td>
<td>6</td>
<td>HCAD agent number of active fiduciary</td>
</tr>
<tr>
<td>HCAD_ACCT</td>
<td>Text</td>
<td>13</td>
<td>HCAD Account Number</td>
</tr>
<tr>
<td>JUR_CODE</td>
<td>Text</td>
<td>3</td>
<td>HCAD jurisdiction code on account</td>
</tr>
</tbody>
</table>

### Value Protest (electronically submitted, comma delimited)

<table>
<thead>
<tr>
<th><strong>Element</strong> (column)</th>
<th><strong>Data Type</strong></th>
<th><strong>Max Length</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX_YEAR</td>
<td>Text</td>
<td>4</td>
<td>Protest tax year (format: yyyy)</td>
</tr>
<tr>
<td>FID_AGENT_CODE</td>
<td>Text</td>
<td>6</td>
<td>HCAD agent number of protesting agent</td>
</tr>
<tr>
<td>HCAD_ACCT</td>
<td>Text</td>
<td>13</td>
<td>HCAD Account Number under protest</td>
</tr>
<tr>
<td>VALUE</td>
<td>Numeric</td>
<td>12</td>
<td>Owner’s opinion of value (optional)</td>
</tr>
<tr>
<td>REP_TYPE</td>
<td>Text</td>
<td>1</td>
<td>Type of protesting agent representation: O or blank -- Owner, L -- Lessee</td>
</tr>
<tr>
<td>Protest_Type</td>
<td>Text</td>
<td>1</td>
<td>Type of protest requested: M – Market, U – Unequal Appraisal, B – Both (M – default)</td>
</tr>
<tr>
<td>HB201</td>
<td>Text</td>
<td>1</td>
<td>Y – HB201 is requested N- HB201 is not requested (default)</td>
</tr>
</tbody>
</table>

Agent can include any additional data columns they would like after the HB201 column. These will not be processed. The file **must** be comma delimited.
**EDOC File Definition** (only agents that have enrolled in eDocuments will have this file available)

<table>
<thead>
<tr>
<th>Element</th>
<th>Data Type</th>
<th>Max Length</th>
<th>Description</th>
</tr>
</thead>
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<td>Protest tax year</td>
</tr>
<tr>
<td>FID_AGENT_CODE</td>
<td>Text</td>
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<td>HCAD agent number of protesting agent</td>
</tr>
<tr>
<td>HCAD_ACCT</td>
<td>Text</td>
<td>13</td>
<td>HCAD Account Number under protest</td>
</tr>
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<td>Electronic Document Type Code</td>
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<td></td>
<td></td>
<td>HN: Hearing Scheduling Notice</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>HR: ARB Determination Order</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>NT: Notice of Value</td>
</tr>
<tr>
<td>DOC_DATE</td>
<td>Date</td>
<td>10</td>
<td>Document Date – format MM/DD/YYYY</td>
</tr>
</tbody>
</table>
Please read the “eDocuments Terms and Conditions” document before enrolling in eDocuments. You can scroll through this document or open and print the PDF by clicking on the “eDocuments Terms and Conditions PDF” link. After reading the “Terms and Conditions” please continue with the enrollment process as summarized here:

1. Click on the checkbox (Agent has read the “Terms and Conditions”) to indicate you have read the “Terms and Conditions”. A red “Request Enrollment” button will appear which you must click on to begin the enrollment process.
2. Clicking on the “Request Enrollment” button will cause an email to be sent to the email address on record for your agency within Online Agent Services. Additional instructions will also be displayed on the screen at that time (see next page in this documentation for details).
3. The enrollment request will not be completed until you follow the instructions in that email. If you do not receive the email within a few minutes please ensure that the email address HCAD has on record within Online Agent Services (OAS) is correct. You can do this by clicking on the “My Account” link in the top right corner of most OAS screens.
4. After following the instructions in the email you will receive an email confirming your enrollment in eDocuments.
5. After finalization you cannot withdraw from eDocuments without sending a written rescission to HCAD’s agent coordinator. Once your enrollment has been withdrawn (at your written request) you cannot re-enroll in the same calendar year.
eDocuments Enrollment (continued)

Please note the “ENROLLMENT ACTIVATION INSTRUCTIONS” that appear after you have clicked on the “Request Enrollment” button.
eDocuments Enrollment (continued)

After requesting enrollment in eDocuments you will receive an email similar to the one below. It contains information and instructions for finalizing your request for enrollment in eDocuments. You must read and follow these instructions.

Subject: HCAD Online Agent Services - eDocuments Enrollment Request, Agent [Redacted]

***** Please note that this email is an automated service and is not monitored for replies. *****

eDocuments Enrollment Finalization Instructions

Dear [Redacted] (Agent [Redacted] - [Redacted]),

You have requested enrollment in HCADs eDocuments functionality of Online Agent Services for agent [Redacted] and associated sub-agent numbers, if any. By enrolling in eDocuments you have indicated that you do not want HCAD to mail certain documents to you. These documents will be available to you electronically through functionality within Online Agent Services and via FTP (only available if enrolled in eDocuments).

Electronic documents (eDocuments) consist of Value Notices, Hearing Scheduling Notices, and ARB Demination Orders.

Instructions for accessing HCADs FTP site can be found on OASs main menu under the eDocuments Enrollment button.

Please note: HCAD does not place files on the FTP site for your agency until after you have enrolled in eDocuments and after HCAD has a processing run that includes documents for your agency. We do not back load the FTP site with documents generated prior to your enrollment in eDocuments. You will not be allowed to login to the FTP site before documents are available.

Please click on the link below to confirm this selection. If you did not authorize this change or have changed your mind, do not click on the link.

http://agents.harriscad.dev/eDocuments/eDocumentsEnrollmentActivator.aspx?ConfirmationKey=ZxdsFHdFG0HhfKm0fNEdcw==&ControlKey=ZxdsFHdFG0HhfKm0fNEdcw==

If, at some future date, you decide you do not want to receive the documents electronically, you must submit a rescission in writing to HCADs agent coordinator. Once your written rescission has been processed by HCAD you will receive an email to that effect and you will not be permitted to re-enroll within the current tax year.

The eDocuments Enrollment screen in Online Agent Services provides you with the Terms and Conditions.

Thank You,  
Harris County Appraisal District (HCAD)
eDocuments Enrollment (continued)

After clicking on the link in the finalization email (see previous page) the agent will see the screen below. As stated on this screen, a confirmation email is sent (see next page).
eDocuments Enrollment (continued)

The “eDocuments Enrollment Confirmation” email is sent as a result of clicking on the link in the “eDocument Enrollment Finalization Instructions” email (above).

----- Please note that this email is an automated service and is not monitored for replies. -----

**eDocuments Enrollment Confirmation**

**Subject:** HCAD Online Agent Services - eDocuments Enrollment Confirmation.

Dear [Agent Name],

Your request for enrollment in the eDocuments functionality of Online Agent Services has been processed for agent [Agent ID] and associated sub-agent numbers, if any. Documents already processed for mailing will still be mailed. Documents covered by the eDocuments enrollment agreement, both past, present, and future, will be available in the View eDocuments functionality of HCADs Online Agent Services (OAS) and via FTP (only available if enrolled in eDocuments).

Electronic documents (eDocuments) consist of Value Notices, Hearing Scheduling Notices, and ARB Deministration Orders.

Instructions for accessing HCADs FTP site can be found on OASs main menu under the eDocuments Enrollment button.

**Please note:** HCAD does not place files on the FTP site for your agency until after you have enrolled in eDocuments and after HCAD has a processing run that includes documents for your agency. We do not back load the FTP site with documents generated prior to your enrollment in eDocuments. You will not be allowed to login to the FTP site before documents are available.

If at some future date you decide you do not want to receive the documents electronically, you must submit a rescission in writing to HCAD. Once your written rescission has been processed by HCAD you will not be permitted to re-enroll within the tax year your rescission became effective.

The eDocuments Enrollment screen in Online Agent Services provides you with the Terms and Conditions.

Thank you for selecting eDocuments.
Harris County Appraisal District (HCAD)

This series of emails are legal proof that the agency and HCAD have entered into an agreement pertaining to the distribution of certain documents covered by the eDocuments “Terms and Conditions”. No signed documentation is necessary or required.
eDocuments Enrollment (continued)

Once you have enrolled in eDocuments, on subsequent visits to the “eDocument Enrollment” screen, it will appear as follows:

You cannot terminate your enrollment in eDocuments yourself. You must submit a rescission in writing to HCAD.

If you send a rescission request to terminate enrollment in eDocuments and after HCAD has processed that request, on subsequent visits to this screen it will appear as follows:

Once your enrollment has been withdrawn by HCAD (at your request) you cannot re-enroll in the same tax year. The checkbox will be disabled.
View eDocuments

If the agent has a reasonable number of accounts/eDocuments then the above screen will be displayed upon the initial selection of eDocuments from the Home: Main Menu page. If the agent has an excessive number of accounts/eDocuments see the next page.

In the filtering section of this screen you can see the total number of Agent Accounts and the total number of Agent Account Documents. The total number values should not change when you apply a filter to the data. You can also see the filtered number of Agent Accounts and the filtered number of Agent Account Documents. The filtered number values change when you apply a filter to the data.

NOTE: When filtering is applied it limits the list of accounts not the eDocuments available for the accounts listed.
Filtering

Large Number of Accounts/eDocuments

Some agents have a considerable number of accounts with multiple eDocuments for which they have fiduciary authority. For those agents, to ensure quick response time from OAS, an initial warning screen is displayed informing the agent of the need to filter the data before OAS can return any information. **Filtering is required in this instance.** Without filtering it is possible that the OAS will return too much data for the browser to handle and a failure will occur.

Filtering Options

Both the “Account” and the “Find Owner Containing” filters allow you to specify partial values as the filter. You can specify one or more filtering options at the same time.

You can filter by:

- **Account** – limits the account list to those account numbers **beginning** with whatever portion of the account number you enter into this field.
- **Find Owner Containing** – limits the account list to those accounts that have whatever portion of the Owner name specified found anywhere in the Owner field.
- **eDocument Type** – limits the account list to those accounts that have one or more eDocuments of the type specified. In addition to the eDocument Type you filter on, if the account has multiple eDocument Types available, those will still be available for viewing even though you requested only one particular eDocument Type in the filter.
  - Current eDocument Types
    - Hearing Notice
    - Notice Of Value
    - ARB Determining Order
- **Viewed by Agent** – limits the account list as indicated.
  - default, list all accounts for the agent
  - Viewed - list all accounts for which the agent **has viewed** one or more documents
  - Not Viewed - list all accounts for which the agent **has not viewed** one or more documents
- **Document Date Range** – limits the account list to those accounts which contain one or more documents whose document date falls within the range.
  - For a single day you only need to specify one of the dates.

To clear all filtering, click on the “Clear Filter” button. You do not need to “Clear Filter” before applying a different filter.

**NOTE:** Filtering limits the list of accounts not the eDocuments available for the accounts listed.
Filtering Examples

In the above example you can see that the filtered number values have changed based on the filtering criteria that was applied. For the example above you will notice that accounts beginning with 04 were requested, resulting in the five accounts you see above.

If you click on the dropdown arrow for a specific account you will see the list of eDocuments that are available for that account and the associated Document Date and Agt View Date. When you click on one of the documents in the dropdown list a PDF containing that document will open.

In the above example you can see that filtering was done for “eDocument Type” = “Notice Of Value” and a “Document Date Range” between 3/29/2013 and 3/29/2013.

For the example above, please notice that all accounts that have a “Notice Of Value” document and the “Notice Of Value” document is within the “Document Date Range” indicated will be displayed. In addition to the “Notice Of Value” document, you will also have access to any other document type that the account has on it regardless of the filtering specifications.

NOTE: Filtering limits the list of accounts not the eDocuments available for the accounts listed.
In the above example, filtering was requested for accounts which have documents viewed by agent.  

**NOTE:** Filtering limits the list of accounts not the eDocuments available for the accounts listed.
Descriptions: eDocument – Document Date – Agt View Date

If you click on the dropdown arrow for a specific account you will see the list of eDocuments that are available for that account and the associated Document Date and Agt View Date.

As you select eDocuments for various accounts, the eDocument you last viewed for the account remains on the screen so that you will know you have viewed that document. This only applies while you are on this page at this moment. Once you leave this page and come back these values will be blank. While an eDocument name is displayed, if you want to look at it again, you must select a different document for that account and then select the eDocument you want to look at again.

There can be two dates displayed after the document name. The first date is the document date that appears on the document. The second date is the date the document was first viewed by the agent.

In the above example you can see, in the “eDocument – Document Date – Agt View Date” column, information concerning the individual document.

- **eDocument:** the document name.
- **Document Date:** the date printed on the document.
- **Agt View Date:** the date the agent first viewed the document via OAS. Once set it is never reset.

**NOTE:** Filtering limits the list of accounts not the eDocuments available for the accounts listed.
NOTE: Filtering limits the list of accounts not the eDocuments available for the accounts listed.

In the example above, Viewed was selected for the filter. Even though the account highlighted above does not show that the Hearing Notice displayed has been viewed by the agent, there is another eDocument on this account that has been viewed by the agent. Therefore, the account and all eDocuments on that account are listed.

In the example above, Not Viewed was selected for the filter. Even though the account highlighted above shows that the Hearing Notice displayed has been viewed by the agent, there is another eDocument on this account that has not been viewed by the agent. Therefore, the account and all eDocuments on that account are listed.

NOTE: Filtering limits the list of accounts not the eDocuments available for the accounts listed.
Agent Upload Files (under construction)

This functionality allows the agent to transmit electronically to HCAD, certain specified data files. Currently HCAD will accept account protest files provided the data is in the format specified by the “Protest File Format (Excel Template)”. A link to this template can be found at the top of the file upload page.

After you have created your file, using the template as a guide:

1. Select the “Data Type” from the dropdown. There is currently only one file data type acceptable and it is the default.
2. Use the browse button to locate the file you have created on your system. After you have selected the file it will show up after “File:” label.
3. Click on the “Send File To HCAD” button.
4. You will receive an email upon successful completion of the upload and you will receive another email as soon as HCAD has processed your data. HCAD does not process your data immediately upon receipt. It could take several hours before you receive the second email.

If, within 24 hours, you have not received both the emails listed in step 4, please contact HCAD’s agent services group.
Email Examples

Email – Informal No Change and/or Protest Withdrawal Verification

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From: HCAD Online Agent Services <donotreply@HARRISCAD.ORG>
To: [Redacted]
Cc: [Redacted]
Subject: HCAD Online Agent Services Formal No Change and/or Protest Withdrawal Verification

**** Please note that this email is an automated service and is not monitored for replies. *****

Agent Number [Redacted]
For Tax Year: 2015

Dear [Redacted]

This e-mail is confirmation that withdrawal of one or more protests were requested via Online Agent Services at 4/7/2016 11:47:21 AM for the following account(s):

<table>
<thead>
<tr>
<th>Account</th>
<th>Owner Name</th>
<th>Action Initiated</th>
</tr>
</thead>
<tbody>
<tr>
<td>04</td>
<td>[Redacted] INC</td>
<td>Informal No Change</td>
</tr>
<tr>
<td>120</td>
<td>[Redacted] LLC</td>
<td>Protest Withdrawal</td>
</tr>
</tbody>
</table>

Total accounts: 2

Additional processing at HCAD may be necessary before your request is finalized.

For a withdrawal, if a formal hearing has been scheduled, you will receive a notice of your withdrawal by standard mail.

If you have any questions, call the agent section at 713-812-5858.

Thank you for using Online Agent Services.
Email - Protest Verification

***** Please note that this email is an automated service and is not monitored for replies. *****

Agent Number
For Tax Year: 2014

Dear [Redacted]

This email is confirmation that online protest request(s) were successfully filed through Online Agent Services at 1/2/2014 12:37:22 PM for the following account(s):

<table>
<thead>
<tr>
<th>Account</th>
<th>Owner Name</th>
<th>Action Initiated</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>A</td>
<td>LC Protested - Mkt</td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>LC Protested - UA</td>
</tr>
<tr>
<td>2</td>
<td>A</td>
<td>LC Protested - Both Mkt &amp; UA</td>
</tr>
</tbody>
</table>

Total accounts: 3

Additional processing at HCAD may be necessary before your request is finalized.

For a protest, you will receive a notice of your protest hearing date by standard mail.

If you have any questions, call the agent section at 713-812-5858.

Thank you for using Online Agent Services.

Sincerely,

Harris County Appraisal District (HCAD)
Email - Rendition Extension Request

***** Please note that this email is an automated service and is not monitored for replies. *****

Agent Number: ******
For Tax Year: 2014

Dear ******

This e-mail is confirmation that an online rendition extension request was successfully filed through Online Agent Services at 1/3/2014 8:19:30 AM for the following account(s):

<table>
<thead>
<tr>
<th>Account</th>
<th>Owner Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>206</td>
<td>PAT</td>
</tr>
<tr>
<td>187</td>
<td></td>
</tr>
<tr>
<td>188</td>
<td></td>
</tr>
<tr>
<td>98</td>
<td></td>
</tr>
<tr>
<td>336</td>
<td></td>
</tr>
</tbody>
</table>

Total accounts: 5

Additional processing at HCAD may be necessary before your request is finalized.

You will receive a notice of your rendition extension request by standard mail.

If you have any questions, call the agent section at 713-812-5858.

Thank you for using Online Agent Services.

Sincerely,

Harris County Appraisal District (HCAD)
Email - Password Change

When you have successfully logged onto the application and click on the "Change Password" link at the top of the page you will be taken to a screen that will allow you to change your password. The following email is generated as a result of you requesting a change in your password.

**** Please note that this email is an automated service and is not monitored for replies. ****

**Your Password Has Been Changed.**

This email confirms the password for agent [REDACTED] has successfully been changed.

If you did not authorize this change, please contact the agent section at 713-812-5838 immediately.

Thank You,
Harris County Appraisal District (HCAD)

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Email - Password Reset

When you have forgotten your password and are on the "Logon" screen you can click on the "Forgot Password" link at the top of the page to reset your password. The following email is generated as a result of you requesting a reset of your password. The new password is randomly generated by the application. HCAD strongly suggests that you change this password, as soon as possible, to something you will remember.

**** Please note that this email is an automated service and is not monitored for replies. ****

**The password for agent number [REDACTED] on Online Agent Services has been reset.**

According to our records, you have requested that your password be reset. Your new password is [REDACTED].

Once logged into Online Agent Services, you may change your password by clicking the "Change Password" link located in the upper right corner of the page.

If you did not make this request, please contact please contact the agent section with the Agent Department at 713-812-5838 immediately.

Thank You,
Harris County Appraisal District (HCAD)
Email - New User Logon

When a new agent has been added to Online Agent Services the following email will be sent to the email address on record for that agent. The password is randomly generated by the application. The initial Security Question and the Security Question Answer are specified by the HCAD employee that is setting up the agent.

HCAD strongly encourages the agent to change their Password and the Security Question Answer. HCAD recommends that you change your Security Question to one of the five selections available, if you find a question you like better. To change any of these items click on the "Change Password" link at the top of the "Home: Main Menu" page.

***** Please note that this email is an automated service and is not monitored for replies. *****

This e-mail is confirmation that the Harris County Appraisal District has created a logon for [REDACTED] so that you can access the Online Agent Services website at www.hcad.org/agents.

The following account defaults have been set for you:

<table>
<thead>
<tr>
<th>Logon ID:</th>
<th>[REDACTED]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td>XASKCX6Y</td>
</tr>
<tr>
<td>Security Question:</td>
<td>[REDACTED]</td>
</tr>
<tr>
<td>Security Question Answer:</td>
<td>[REDACTED]</td>
</tr>
</tbody>
</table>

HCAD strongly recommends that you change your password and security question answer after you log onto the system.

More detailed information on how to use Online Agent Services can be found by clicking the About button located on the top of each page of Online Agent Services.

If you have any questions please contact the agent section at 713-812-5858 for more information.

Thank you for using Online Agent Services.

Sincerely,

Harris County Appraisal District (HCAD)
Email - Email Address Update

See page 10 for additional information.

----- Please note that this email is an automated service and is not monitored for replies. *****

Your Email Address Has Been Changed.

This email confirms the email address has successfully been changed.

The old email address was: [old email address]

The new email address is: [new email address]

If you did not authorize this change, please contact the agent section at 713-812-5856 immediately.

Thank You,
Harris County Appraisal District (HCAD)
Email - Phone Number Update

See page 10 for additional information.

Your Phone Number Has Been Changed.

This email confirms the phone number for agent [REDACTED] has successfully been changed.

The old phone number was [REDACTED]

The new phone number is [REDACTED]

If you did not authorize this change, please contact the agent section at 713-813-5858 immediately.

Thank You,
Harris County Appraisal District (HCAD)
Email - Security Question-Answer Update

See page 10 for additional information.

Your Security Question and/or Answer Has Been Changed.

This email confirms the security question and/or answer for agent [REDACTED] has successfully been changed.
The new security question is [REDACTED]
The new security answer is [REDACTED]

If you did not authorize this change, please contact the agent section at 713-812-3858 immediately.

Thank You,
Harris County Appraisal District (HCAD)
Email – Notification of Scheduling Notice documents

HCAD Hearing Scheduling Notice electronic document available for Tax Year 2016 for Agent [donotreply@hcad.org]
Sent: Tuesday, April 19, 2016 2:45 PM
To: [donotreply@hcad.org]
Attachments: accountDetail.xls (41 KB)

This message is to inform you that the following HCAD or ARB document has been made available electronically via HCAD’s Online Agent Services System.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>Document Date</th>
<th>Batch ID</th>
<th>Property Type</th>
<th>Description</th>
<th>Number of Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>04/08/2016</td>
<td>201670001</td>
<td>R.</td>
<td>Hearing Scheduling Notice</td>
<td>32</td>
</tr>
</tbody>
</table>

To access this document, please log into Online Agent Services and go to the “View eDocuments” page.

If you have any questions, call the agent section at 713-812-5850.

As represented by the list of property accounts that can be found in the download file area of Online Agent Services System.

“HN” (Hearing Scheduling Notice)
“HR” (ARB Determination Order)
“NT” (Notice of Value)

HCAD also attaches to this email a list of the accounts.
Email – Notification of Notice of Value documents

HCAD Value Notice electronic document available for Tax Year 2016 for Agent
Harris County Appraisal District [donotreply@hcad.org]

Sent: Wednesday, April 06, 2016 8:27 PM
To: 
Attachments: accountdetail.txt (13.9 KB)

This message is to inform you that the following HCAD or ARB document has been made available electronically via HCAD’s Online Agent Services System.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>Document Date</th>
<th>Batch ID</th>
<th>Property Type</th>
<th>Description</th>
<th>Number of Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>04/06/2016</td>
<td>201600078</td>
<td>R</td>
<td>Value Notice</td>
<td>50</td>
</tr>
</tbody>
</table>

To access this document, please log into Online Agent Services and go to the “View eDocuments” page.

If you have any questions, call the agent section at 713-812-5858.

As represented by the list of property accounts that can be found in the download file area of Online Agent Services System.

HCAD Online Agent Services System

“HN” (Hearing Scheduling Notice)
“HR” (ARB Determination Order)
“NT” (Notice of Value)

HCAD also attaches to this email a list of the accounts.
Email – Notification of ARB Determination Order documents

This message is to inform you that the following HCAD or ARB document has been made available electronically via HCAD’s Online Agent Services System.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>Document Date</th>
<th>Document Type</th>
<th>Total Personal Property Accounts</th>
<th>Total Real Property Accounts</th>
<th>Total Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>03/29/2013</td>
<td>ARB Determination Order</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

To access this document, please log into Online Agent Services and go to the "View eDocuments" page.

If you have any questions, call the agent section at 713-812-5858.

As represented by the list of property accounts that can be found on the "View eDocuments" page.

HCAD will also attach a text file to this email, but as of this modification to the documentation it has not been implemented.