

Redefining the Taxpayer Experience

Collin CAD's Success with PACS' ARB System

Taxpayer
Experience

True Automation, Inc.

Since Collin County is one of the fastest growing counties in Texas, one would think that their main objective is to facilitate the number of inquiries and protests they handle each year. Instead, it is surprising to understand that their actual main priority is to make the entire process easier for their customers — the taxpayers—which in turn facilitates all of their other processes.

District Overview

There are approximately 950 square miles in the county located in Plano, Texas. As of July 2003 there were over 240,000 real parcels and 260,000 total parcels located in Collin County. This appraisal district is composed of 14 school districts, 24 cities, and three special districts. The district services all taxpayers, tax agents, and taxing jurisdictions with a staff of 75 employees. Collin CAD parcel growth is growing at 8-10% annually.

Jimmie Honea, Chief Appraiser, explains the district's priorities: "We have two main objectives here: We want to ensure that taxpayers' values are appraised correctly so that they are paying the correct tax amount, and we want to help the taxing entities or units by helping them set the accurate tax rate. We don't want them to have to set the rate higher than they should. Our ultimate objective is to ensure a fair and equal value of all appraised properties."

Collin CAD's ARB Process

The appraisal review board's primary function is to hear protests filed by a property owner or the owner's agent, regarding the district's appraisal of the subject property. The ARB also hears protests concerning exemptions, ag-use valuations and ag-use rollbacks. The annual appraisal notices are distributed during the first week in May.



Linda Gerber, Director of Customer Services, and Tammy Johnson, MIS Manager and Mapping / GIS Director, greet taxpayers at the registration desk.

The Inquiry Process

Collin CAD tracks all inquiries that are submitted by taxpayers after appraisal notices are mailed in May. The PACS Inquiry system tracks meetings between taxpayers and district appraiser and handles all written correspondence. These informal meetings help reduce the number of formal protests that are submitted to be heard by the Appraisal Review Board.

The Protest Process

The deadline for protest filings is the end of May. At Collin CAD, all protests are heard and resolved by July 20th, in time for submission of certified totals to the taxing jurisdictions by July 25th. Collin has five three-member panels that hear four hearings per hour. The district usually schedules 450 hearings per day and they have about 150 hearings actually take place. "During the ARB process, Collin CAD will schedule more than 30,000 hearings, including the agent hearings," said Tammy Johnson, MIS Manager, Mapping/GIS Director for the district, "and our panels will hear almost 3900 total protests. From an information technology perspective, we are pulling out all the stops to ensure that our staff has everything they need to make this process run as smooth as possible."

True Automation's PACS ARB System

Based on Collin CAD's, and many other districts', requirements, True Automation invested a considerable amount of development resources to enhance the ARB component of the PACS application. Collin CAD and True Automation teamed together to create a comprehensive software utility that would make every aspect of the ARB process easier for counties and more efficient for all parties involved. True Automation understands the issues around the support and management of the overall ARB process and wanted to help its customers, such as Collin CAD, make this process more efficient and less costly.

The enhanced ARB System was released in March 2003 and Collin CAD was one of the early adopters of the new software. True Automation worked closely with the district in its implementation to ensure a smooth transition to the new technology, and to minimize any disruption to the county's service to its taxpayers.

The ARB System contains a considerable amount of new functionality that other appraisal software applications do not yet address.

- The ARB System provides **MS Word Letter Processing** for customization of letters to fit the district's workflow and procedures. Other systems have cumbersome merge tools and individual customization of letters is extremely difficult. With MS Word Letter Processing embedded into PACS, users can use applied knowledge of MS Word and change documents without assistance from their IT department or True Automation Technical Support. In addition, this utility provides automatic archive and data capture capability so that users can view events at a later time. The letters and notices are copied and saved within the system so that when they are viewed later, they appear exactly as they did on the day that they were sent out. Collin CAD uses this capability for important documents such as hearing notifications, hearing affidavits, and ARB orders.
- The system can provide **Auto Scheduling** as protests are entered into the system. The system has a flexible and configurable ARB auto-scheduling utility that applies the unique business rules of the district.
- The new feature **Automatic Comp Grid Generation for Inquiries** eliminates the need for the appraiser to be attempting to find comps while in the presence of the taxpayer. With this feature, when the taxpayer walks in and is greeted by the clerk at the front desk, an inquiry record can automatically be generated. As the taxpayer walks to the assigned appraiser's office, the comp grid is generated. When the taxpayer walks in to the appraiser's office, the appraiser is automatically notified of the taxpayer's arrival and has a comparison grid prepared for the meeting.
- The **Automatic Comp Grid Generation for Protests** eliminates the need for the appraiser to "prepare" a grid manually, which can be time-consuming. If the appraiser does not want to use the automatically generated comp grid, the appraiser can generate a new grid based on different criteria at any time. This new grid can be generated on the fly.
- The **Digital ARB Recording** capability allows the ARB hearings to be recorded automatically and encoded in a MP3 format. Usually districts have to do this with manual tape recorders or third-party software that resides outside of the application and is cumbersome to manage.
- The **Mass Entry** feature allows users to enter multiple protests and have them automatically scheduled by simply entering in the GEO or Prop Ids. This new feature made scheduling agent hearings simple and quick for Collin CAD.
- The **Automatic ARB Presentation Generation** feature allows districts to automate the creation of the presentation to be given during the review boards. This is all done within PACS. The software will step the users through the entire process.
- The new **ARB Imaging** capability allows for a total paperless ARB system. This is a great improvement over the standard process since the ARB packets traditionally are so time-consuming to prepare and waste so much paper. Collin CAD was able to use the point of entry

The Bottom Line

It could be that one of the best benefits of all is cost savings.

With their PACS implementation, Collin CAD was able to completely overhaul their mass appraisal system with only spending a fraction of the investment of what other districts are currently paying for their systems. The district saved hundreds of thousands of dollars without compromising on functionality. While districts their size are spending millions of dollars creating their own unique systems to handle their ARB processes, Collin CAD was able to partner with True Automation for all required software and hardware to provide a comprehensive system at a surprisingly low cost. This new application allowed them to fulfill their objective of providing unrivaled service to their taxpayers.

And best of all, Collin CAD can rest assured that their new system is backed by a committed company that will support them on any product or implementation issue well into the future.

scanning capability to scan all returning protest forms. For Collin, the protest forms have an individual bar code before they are sent out to taxpayers, when they are returned to the district, the district staff is able to scan these forms and sort them into different groups. Once the form is scanned, the property in question is automatically identified, the protest is created, the hearing is scheduled and the comparison grid is automatically created. In most cases, hearing letters were going out to the taxpayer the same day that the protest was created.

Seamless Correspondence and Scheduling

Collin CAD has previously had a difficult time managing the incoming inquiries and protests that result from the new appraisal notices being distributed. Between May 1st and July 20th, the district receives as many as 20,000 pieces of correspondence relating to the notices.

These various letters and faxes need to be categorized, and if necessary, hearings need to be scheduled for any taxpayer that wants to protest the new appraisal value.



Marcia Rohloff and Debbie Green auto-schedule a taxpayer for a hearing.

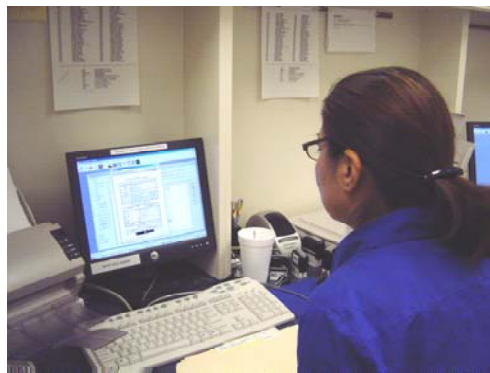
Debbie Green, Appraisal Support Supervisor, and Marcia Rohloff, ARB Coordinator and Administrative Assistant to Chief Appraiser, handle and sort all of this incoming mail.

“Last year, at our peak, we had as many as eight individuals dedicated to the mail sorting task. The automated scheduling feature in PACS’ ARB System **Letter Processing and Auto-Scheduling Features** have made this so much easier in that we can now do all three activities in one easy step: We can enter the information, scan the document and schedule the protest hearing all in one simple step.” Rohloff explained. “Before we had to do cold processing for these notices - these were three independent, time-consuming steps. The new feature has saved us so much time.”

Full Adoption: The Office Staff

Other employees at Collin CAD have also noticed significant improvements in the way they support the annual appraisal inquiry and protest process. Even the process for signing in for a hearing was made faster and more seamless with the introduction of the enhanced PACS ARB System.

With the enhanced ARB System, taxpayers are able to check in at the front desk, and their check in time, and all their additional evidence and associated documents for the hearing are automatically transferred to the ARB check-in desk. When arriving at the ARB check-in desk, the Collin clerks can greet them by name and have their file ready for them. The Collin CAD staff members are able to more easily monitor and manage the process flow. The closely managed process also resulted in better utilization of the panels. The queue for each panel was always balanced.



Lala Coy, IT Specialist, scans additional taxpayer evidence

In addition, all the taxpayer additional evidence is scanned into the PACS system so that it can easily be accessed during the actual protest hearing by the panel. Collin CAD’s ARB process is almost entirely paperless with all documents stored electronically within the system. “PACS’ new ARB System allows us to prepare the hearing folders quickly and easily. We are even able to scan taxpayer evidence in full color, which many times includes color photos of their property. The improvements allow us to handle these hearings in a completely professional way,” stated Lala Coy, IT Specialist.

“The PACS solution, especially the new ARB System, has been heartily embraced by our internal users. They have all the information they need at their fingertips to readily serve the taxpayers during the entire ARB process. Making this process easier for our taxpayers is our number one priority.”

Jimmie Honea, Chief Appraiser, Collin CAD



Jimmie Honea, Chief Appraiser, with his auto-updating Chief Appraiser Monitor.

In addition, there are various views that can be set up for different job functions. This feature allows you to display ARB record information and automatically refresh the screen to display updated information as the hearings are heard and closed by the ARB Recorder in each panel. At Collin CAD there is a central, flat-panel monitor which displays the chief appraiser view. Since the Chief Appraiser at Collin CAD enjoys a high-level of involvement in every area of the process, this monitor is used by him to keep track of the panel room schedule and route taxpayers to the least busiest panel. Every member of the team is able to refer to this up-to-the-minute updated information at any time to see where a taxpayer is in the ARB process.

No More Wasted Paper, No More Wasted Time: The Hearings

Each of the five ARB panels is made up of three board members. The district has an appraiser and a recorder in each of the panel rooms also. Typically the panel reviews a CAD presentation which contains all the necessary information for the hearing.

When the taxpayer comes to protest an appraisal, he or she usually brings substantial evidence to support his or her case. Previously this evidence was copied and distributed to each panel member. Now, each board member has a flat panel monitor, and the appraiser can easily pull up and display for them the CAD presentation, or any additional information that they may request.

“Previously we had stacks of paper three feet high behind each board member,” stated Steve Ahrens, Collin CAD Appraisal Supervisor. “Now with the PACS ARB **Document Imaging feature** we are able to eliminate all the wasted paper, and we can pull up any piece of evidence electronically for review by any board member. This is done in real-time as we proceed through the protest hearing. It makes my job of representing the district so much easier, and makes the hearing run so much faster.”



ARB Panel 3: Left to right, Carolyn Stovall, David Ewton, Terri Sheppard.

In addition to the system allowing for quick look up of comparison information for properties, GIS maps, and all protester evidence, there is also a feature allowing the entire hearing to be recorded and encoded to MP3 format. With the **Digital Recording feature** of PACS, the recorder who sits in on the hearing is able to input the hearing minutes directly into the PACS application on to the protest record, and start and stop the recording of the proceeding with a single mouse click.

Intelligent Analysis at Our Fingertips: The Appraisers

Previously the appraisers had to manually prepare all comparison properties and research all the data associated with the protest. All this information is now accessible directly in the hearing and easily displayed to ensure that the hearing proceeds seamlessly.

PACS can create the residential comparison grids as the taxpayer files a protest. "With PACS' **Automated Comparison Grid feature**, we can generate the property comparison data on the fly. There is no more heavy preparation required of the appraisers-- PACS does the work for us—on the fly," John Silverwise, Director of Appraisal, Collin CAD, explained. "In addition, the hearings run so much smoother-- there is no down time, searching for data-- it is all there-- at our fingertips.



Steve Ahrens, Residential Appraisal Supervisor, represents the CAD at an ARB hearing. Diane Alvarez records the hearing and takes the hearing minutes.

Also, True Automation incorporated a new **Neighborhood Profiling feature** in their recent software release. Previously, only our IT department could generate these neighborhood profiles and it took days to complete the report. Now, we can generate the Neighborhood Profile ourselves and it only takes a matter of minutes."

After a decision is made by the panel, the recorder is able to enter the information into the application, and after the hearing, the appraiser can go into the application, review all the presented information and motions, and complete the adjusted value.

After the hearings are over, appraisers are able to quickly get back to appraising the properties for the next year. There is no additional paperwork to complete.

The new ARB System also provided the **Enhanced Sales Analysis Reporting** feature. This allowed the appraisers at Collin CAD to generate reports on all aspects of the sales/appraised value ratio. The appraisers at Collin CAD are able to generate ratio reports on a specific subdivision, neighborhood, or even a specific listing of individual properties. The system will analyze these properties and provide a report with all the essential information that the appraisers require, such as the weighted mean value.

For the commercial property appraisers, True Automation enhanced the **Income Approach with Pro Forma** and the **Commercial Comparison Grid** features. "True Automation was able to work closely with us to understand the commercial appraisal needs. After listening to our requests they were able to provide us with a first-rate application that provided the functionality to do a new income approach with a Pro Forma and a new commercial comparison grid", explains Chris Rider, Director of Commercial Appraisals, Collin CAD.

Bo Daffin, Commercial Appraiser for Collin CAD, added, "We are now able to validate the final appraised value as we complete our informal hearing and close the inquiry record. PACS does a real-time comparison of the appraiser's final value conclusion to the current value in the system. This immediate audit and verification is very beneficial to us, ensuring that value agreements are correct, which translates to an accurate certified roll.

These new features, with the inclusion of a fully integrated ARB System, make PACS an outstanding software package for any size appraisal district. I have a lot of experience with software available to appraisal districts and PACS has delivered an excellent set of appraisal tools with the functionality we need to perform our jobs. Whether we're serving an individual taxpayer or an agent representing hundreds of properties, it doesn't matter. The system works."

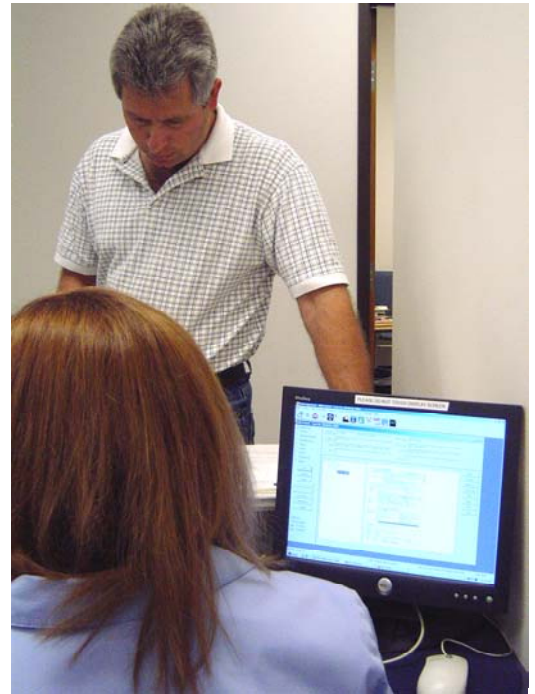
Redefining the Taxpayer Experience

After implementing the PACS' enhanced ARB, Collin CAD was able to truly redefine the taxpayer experience. After completing the cycle of one full ARB process using the new software, the district was able to see a visible difference in the service they were providing to their taxpayers.

- They were able to improve their handling of all incoming correspondence dealing with the Inquiry and Protest processes.
- They were able to automatically schedule protests in one easy step.
- They were able to greatly improve wait time for the taxpayers.
- They minimized the amount of time the panels had to previously wait for their new protests. There was no more "dead-time".
- They were able to create an almost entirely paperless ARB process.
- Their appraisers were able to reduce preparation time for protest hearings.
- The appraisers were able to generate automatic comparison data for similar properties in a matter of seconds.

Tammy Johnson explained, "The overall process has been greatly improved. With this enhanced functionality, we are able to do many additional administrative tasks such as, printing and archiving all process and hearing documents to Adobe PDF format, review complete details of the property for multiple years, track changes to nearly all fields in the database, recalculate routine identifying PTD coding errors as well as data entry errors, track CAD history totals thru supplements, and we are able to recalculate property, entity, CAD, PTD, effective rate totals back-to-back within one screen and within two hours for all entities."

"For providing the best service to our taxpayers, the individual features of the software are important, but committed, dedicated support is essential for making the implementation a success for us, and our taxpayers. True Automation is 100% committed to making our project a success," stated Honea. "They are true strategic development partners-- they understand our business and our priorities."



Michele Lake, a member of Collin's ARB Desk Staff checks-in a taxpayer for a scheduled ARB hearing.

About True Automation, Inc.

True Automation is the premier provider of property tax and appraisal solutions in Texas. True Automation's suite of solutions include PACS Appraisal, PACS Collections, Truth-in-Taxation.com and GIS Integration Services.

Began in 1990 and incorporated in 1997, True Automation has quickly become the most progressive software provider for county tax and appraisal districts. Since then, True Automation has grown to almost thirty employees, and over fifty customers.

True Automation has enjoyed this revolutionary growth due to its unrivaled understanding of the property tax and appraisal process and its aggressive commitment to meeting the needs of its customers.



Phone: 972-881-1858
Fax: 972-633-0533
www.trueautomation.com