



### The Client:

Travis Central Appraisal District (TCAD) is responsible for objectively determining the value of all real and business personal property within Travis County, Texas. Texas is one of seven states in the U.S. to have no state income tax; therefore, funding for public services (schools, libraries, hospitals, road maintenance, etc.) is generated by property taxes. In Travis County property taxes support 127 local government agencies. The county has approximately 450,000 properties that must be assessed annually according to the Texas Property Tax Code and the Uniform Standards of Professional Appraisal Practices (USPAP).

## Case Study:

### Travis Central Appraisal District

Rapid deployment and customized remote workflow for county appraisal hearings

### The Process:

Texas county property tax process is complex. In Travis County it takes four to five months to assess all properties; if a property value increases by \$1,000 or more compared to the prior year, property owners will receive a notice of appraised value by mail. Property owners can legally protest their appraised property value themselves, or hire an agent to represent them. A protest, which can be filed online, in-person, or by mail, starts an informal process that begins with a discussion between the property owner, or agent, and a TCAD appraiser; if an agreement is not made, an Appraisal Review Board (ARB) hearing will be scheduled.

The ARB is a board of local citizens appointed by the county administrative judge; a panel of three board members is assigned to each property hearing. Property owners and their representing agents attend the same type of property hearing, the only difference is the volume in respect to agents. A property owner usually has a hearing for a single property, or more if they own multiple houses, where an agent will represent hundreds or thousands of property owners. Agents may deal with 50 or more properties in a single hearing session. After arguments and evidence are presented on both sides, the panel members come to a decision and the property owner will receive a final notice order by certified mail. Travis County has the highest protest rate in the state and in 2019 alone there were over 145,000 property hearings in the Travis Central Appraisal District office.



## The Challenge:

Precautions to help slow the spread of COVID-19 forced the TCAD office to close to the public in March 2020. Despite the closure, an extension was not granted by the state, and all tax values had to be certified by August 31, 2020. TCAD needed an effective and timely solution to conduct hearings in a safe manner. There were several issues to consider. The appraisal review board is made up of retired community members with an average age over 70 and COVID-19 posed a significant threat to their health and they needed a solution that was easy to use. Office administrators were overwhelmed answering thousands of calls daily while managing in-person ARB hearings. TCAD needed a solution to streamline their workflow process and enable their employees and board members to work remotely. Early in the pandemic, TCAD used Zoom® and GoToMeeting® for general collaboration but knew that these solutions would not suffice for their complex workflow needs. TCAD's long time communications partner ConvergeOne was consulted and brought in the Compunetix team to meet and see if they could design a viable solution that would address their customer's very specific needs.

*"In regard to any phone solution we've put in place, this was the easiest implementation. The Compunetix team was great; they really didn't need much info from us. We provided the basics of what we needed and they took care of it, which is not the norm when it comes to our experience."*

- Leana Mann, Director of Operations, Travis Central Appraisal District

## The Solution:

The Compunetix ConferenceManager™ (CM) is a feature-rich audio and web conferencing platform designed with the flexibility to adapt to specific business and industry workflows. This secure and reliable solution, built for effective collaboration, provides seamless access for administrators, users, and guests for operations, executive meetings, hearings, and more. ConferenceManager offers real-time call management, private conference rooms, and encrypted recording for future playback. *(Continued on page 3)*

## Powered by the Operator Console:

The ConferenceManager is engineered with a dynamic operator interface that is central in enabling TCAD's unique, customized workflow. The Operator Console is a powerful tool that allows one or multiple operators to monitor and assist multiple active hearings simultaneously.

### Key Features:

- Automated answering and ID intake for incoming callers
- Drag and drop participants into virtual hearing room
- Start and stop recording between hearings
- Validate and edit property ID for accurate archival (recordings stored based on property ID)
- Operators can join active hearings for troubleshooting
- Added security with oversight of all system activity





## The Solution (cont.):

Compunetix provided TCAD with a custom, cloud-based ConferenceManager platform. Using a customized workflow utilizing the Operator Console application, CM auto-answers all incoming phone calls, and prompts callers to enter their property ID number, then automatically creates the virtual hearing and places the property owner in their respective conference. This new method manages 98% of TCAD's phone calls and relieves office administrators from answering thousands of incoming calls daily, minimizing line back-ups and the frequency of human error.

For efficiency, it is not realistic to have agents hang up after each hearing and call back in using a different property ID. TCAD allows them to call in every morning and stay on the phone the entire day. The enhancement Compunetix developed for TCAD allows their administrative staff to stop and start the recording and label it with the proper property ID, instead of the agent hanging up, and calling back in fifty times a day. Operators can validate the property ID and make corrections, if needed, as the hearing begins, which supports accurate categorizing and filing of recorded hearings for future use. After the ID validation process, operators move the property owner into a conference where the ARB members and TCAD appraiser are waiting to begin the hearing. Operators can also start and stop recordings between hearings. ConferenceManager's virtual environment enabled TCAD to continue their business processes and gave them the ability to meet the state's tax deadline. This cloud-based solution also helped TCAD avoid having to address additional bandwidth requirements since most parties are now remote.

As a government agency, TCAD must be able to provide hearing recordings as public record; they receive thousands of requests for these recordings annually. ConferenceManager allows TCAD to easily locate the property hearing recordings and respond to open record requests. The ConferenceManager reporting automatically correlates the proper tax ID with the proper recording for easy storage and look-up, saving TCAD employees countless hours of tedious work.

## The Future:

Property owners, agents, board members, and administrators prefer the ease and convenience that the ConferenceManager solution offers. Many have voiced their interest in continuing remote hearings after the TCAD office officially reopens to the public. Legally, TCAD must offer in-person hearings when the pandemic ends but will continue to offer remote ARB hearings. Furthermore, TCAD would like to expand their online offerings with the ConferenceManager solution to include informal discussions and meetings. What began as a response to COVID-19 precautions has led to an integrated and efficient workflow solution that offers convenience and flexibility to the community of Travis County.



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