

Equitable Property Value Documentation (Version 1.0)

Introduction to Equitable Property Value

Equitable Property Value can be used to share authoritative property information, educate taxpayers and collect feedback from taxpayers when they are concerned about the equity of their property value.

It provides 24/7 access to answer common property and tax distribution questions in order to increase public trust and streamline the assessment appeals process. This approach helps stakeholders make well-informed property and development decisions. Equitable Property Value is typically implemented by property appraisal departments, assessors, fiscal offices, and other local government organizations that want to engage taxpayers in the property valuation process.

The Equitable Property Value solution delivers a set of capabilities that help you communicate parcel, property sales, and floodplain information as well as solicit assessment appeals from property owners in order to improve customer service and promote fair and equitable property values.

Requirements

Equitable Property Value requires the following:

- ArcGIS Online
- ArcGIS Hub Premium
- Survey123 Connect

Information products

Equitable Property Value includes the following information products:

Item	Description	Minimum user type
Equitable Property Value	An ArcGIS Hub site used by the general public to access tax parcel and related property information, find comparable sales, file assessment appeals, and identify properties impacted by FEMA floodplain boundaries	Not Required
Floodplain Inquiry	An ArcGIS Web AppBuilder app used by the general public, land development companies, and real estate professionals to locate parcels impacted by FEMA floodplain boundaries	Not Required

Residential Comp Finder	An ArcGIS Web AppBuilder app used by the general public, real estate agents, and appraisers to find comparable sales and related property information	Community Account
Tax Parcel Viewer	An ArcGIS Web AppBuilder app used by the general public to access tax parcel, tax distribution, and related property information on smartphones, tablets, and desktop computers	Not Required
Property Tax Assessment Appeal	An ArcGIS Survey123 form used by the general public to file a formal request for the review of their property assessment	Community Account
Tax Liability Calculator	An ArcGIS Survey123 form used by the general public to compute their estimated tax liability	Not Required

When you deploy this solution in your ArcGIS organization, you also get an ArcGIS Solution item that organizes the key information products and summarizes all the ArcGIS items (applications, forms, projects, maps, feature layers, feature layer views, and so on) included with the solution. The ArcGIS Solution item also illustrates any dependencies items have on each other.

Configure Equitable Property Value

Learn how to configure the Equitable Property Value solution to meet specific needs in your organization.

Load data

Equitable Property Value can be used to share parcel, property sales, floodplain, and tax distribution information. In some cases, you may have this information in ArcGIS or another business system already.

Review the layers provided with the solution and determine what source data you want to load. Then, load your existing data into the hosted feature layers provided with the solution before sharing the maps or applications.

Once you have determined what source data must be loaded, complete one or more of the data loading workflows below.

Load data from a shapefile or file geodatabase

You can load data for TaxParcels, SiteAddresses, SchoolDistricts, FloodZones, and TaxParcelSales from a shapefile or file geodatabase by following the steps below:

1. Create a .zip file of your shapefile or file geodatabase.
2. In your ArcGIS organization, browse to the feature layer you want to populate.
3. On the feature layer item details page, click **Update Data** and select **Append Data to Layer**.
4. Under **Filename**, click **Choose File**.
5. Browse to your .zip file and click **Open**.
6. Under **Contents**, select **Shapefile** or **File Geodatabase**.
7. Click **Upload and Continue**.
8. Choose the layer that you want to load data into and the layer that contains the updated data.
9. Uncheck **Update existing features**.
10. Click **Show field matching** and map the fields between the two layers.
11. Click **Apply Updates**.

Tip:

To make additional updates to a hosted feature layer, see [Append data to layers](#).

Tip:

You can use the [Data Assistant](#) add-in, which is part of the [Community Data Aggregation](#) solution, to load your data into the TaxParcels hosted feature layer. The Data Assistant add-in allows you to [update and load data](#) manually or on a schedule.

Load tax distribution information

To configure the Tax Distribution table in the TaxParcels hosted feature layer in ArcGIS, you may use the sample .csv file included with the solution (TaxDistributionSources.csv).

To load tax distribution from a spreadsheet, complete the steps below:

1. Sign in to your ArcGIS organization and browse to the **TaxDistributionSources** item.
2. On the item details page, click **Download**.
3. Once downloaded, open the **TaxDistributionSources.csv** and populate Parcel ID, Total Tax, and Tax District distribution totals (in dollars).

Note:

After these tax values are populated, you can compute the percent of total tax dollars for each Tax District and populate its corresponding Tax District % attribute—for example, $(TXDIST1/TOTTX)*100 = TXDIST1PER$ or $(\$1500/\$5000)*100 = 30\%$.

4. Alternatively, you can use ArcGIS Pro to populate these values based on their spatial relationship with tax districts.
5. Once TaxDistributionSources.csv is populated with all the necessary data.
6. In your ArcGIS organization, browse to the **TaxParcels** hosted feature layer.
7. On the feature layer item details page, click **Update Data** and select **Append Data to Layer**.
8. Under **Filename**, click **Choose File**.
9. Browse to your .csv file and click **Open**.
10. Click **Upload and Continue**.
11. From **Choose the layer that you wish to append data into**, select the **Tax Distribution** table to load into.
12. Uncheck **Update existing features**.
13. Click **Show field matching** and map the fields between the two layers.
14. Click **Apply Updates**.

Tip:

To make additional updates to a hosted feature layer, see [Append data to layers](#).

Configure the Equitable Property Value site

The Equitable Property Value solution includes the Equitable Property Value Hub site that your organization can configure with your branding and use to share property value information with the public.

Share Equitable Property Value items

When you deploy the Equitable Property Value solution, it will create an Equitable Property Value site, and two Groups (Core Team and Followers) in your ArcGIS organization. Several maps and apps included in the Equitable Property Value solution must be shared with taxpayers before reviewing comparable sales and filing a property tax assessment appeal. Sharing the appropriate maps and apps with the Followers group created with the initiative will allow business owners to access them after creating a community identity.

1. Verify that you are signed in to your ArcGIS organization and browse to the Equitable Property Value folder.
2. Check the check box next to each of the items below:

Item	Name
Web Mapping Application	Residential Comp Finder
Form	Property Tax Assessment Appeal
Web Map	Residential Comp Finder
Feature Layer (hosted, view)	PropertyTaxAssessmentAppeal_fieldworker
Feature Layer (hosted, view)	SchoolDistricts_public
Feature Layer (hosted, view)	TaxParcelSales_public

3. Click **Share**.
4. In the **Share** window, click **Edit Group Sharing**.
5. Click **Equitable Property Value Followers** and click **OK**.
6. Click **Save**.
7. Next, you'll share items with Everyone (public).
8. Check the check box next to each of the items below:

Item	Name
Feature Layer (hosted, view)	FloodZones_public
Feature Layer (hosted, view)	SiteAddresses_public
Feature Layer (hosted, view)	TaxLiabilityCalculator_public
Feature Layer (hosted, view)	TaxParcels_public
Web Map	Floodplain Inquiry
Web Map	Tax Parcel Viewer
Web Mapping Application	Floodplain Inquiry
Form	Tax Liability Calculator
Web Mapping Application	Tax Parcel Viewer
Hub Site Application	Equitable Property Value
Hub Initiative	Equitable Property Value

Note:

You will only have a Hub Initiative item if your organization has ArcGIS Hub Premium.

9. Click **Share**.

10. In the **Share** window, click **Everyone (public)** and click **Save**.

The **Warning: Sharing editable layers publicly** message appears notifying you that you are sharing editable layers publicly.

11. Click **Update**.

[Modify surveys](#)

The Equitable Property Value solution includes two surveys (Tax Liability Calculator and Property Tax Assessment Appeal) that can be used to estimate tax liability for a given property and appeal property tax.

Review the preconfigured questions and adjust as necessary to fit your needs.

[Add additional fields](#)

Both surveys leverage hosted feature layer views created from the TaxLiabilityCalculator and PropertyTaxAssessmentAppeal hosted feature layers. Organizations may want to modify the

Tax Liability Calculator and Property Tax Assessment Appeal surveys by first adding new fields to the hosted feature layers and configuring the surveys to use the newly created fields. When doing so, the new fields must be exposed in the appropriate views.

To add one or more fields to a hosted feature layer and update the views, complete the following steps:

1. Add a new field to a layer in the TaxLiabilityCalculator or PropertyTaxAssessmentAppeal hosted feature layer.
2. Browse to the view in your contents.
3. Click **Open in Map Viewer Classic**.
4. Click the **More Options** button on the appropriate hosted feature layer or table, and click **Set View Definition**. Click **Define Fields**.
5. Scroll to the newly created field and check the box. Click **Apply**.

The new field is added to the view's definition.

[Modify equation for tax liability](#)

To modify an Equitable Property Value survey, complete the following steps:

1. Install Survey123 Connect.
2. Start Survey123 Connect and sign in to your ArcGIS organization.
3. Click **Tax Liability Calculator** and download the survey.
4. Click **Tax Liability Calculator** again to open the survey.
5. On the left pane, click the **Open XLSForm** spreadsheet.
6. Revise the survey logic to reflect the calculation for tax liability in your community.
7. Save the Microsoft Excel spreadsheet and preview your changes in Survey123 Connect.
8. In Survey123 Connect, click **Publish** in the left pane to publish your changes.

Use Equitable Property Value

The Equitable Property Value solution delivers a set of capabilities that help you communicate parcel, property sales, and floodplain information as well as solicit assessment appeals from property owners in order to improve customer service and promote fair and equitable property values.

In this topic, you'll learn how to use the solution by assuming the role of a user and performing the workflows below.

Note: Use your organization's data or configured apps to follow these workflows.

Locate parcels impacted by a floodplain

When the public and real estate professionals search for properties, floodplain boundaries come into consideration. Knowledge of floodplain boundaries helps ensure that informed decisions can be made during the land development and home buying processes.

In this workflow, you will learn how to locate and view authoritative floodplain boundary information (DFIRM panels) provided by the Federal Emergency Management Agency (FEMA) using Floodplain Inquiry.

You will assume the role of a resident in a local community. You want to see whether a property that you are interested in purchasing sits within a floodplain boundary.

1. In a browser, from the Equitable Property Value solution, view the Equitable Property Value ArcGIS Hub site.
2. Scroll to the **Property Applications** section, and then click **Locate Floodplain**.
The Floodplain Inquiry app opens.
3. On the right, in the **Search Parcels** widget, search for a parcel number or address, or click the location directly on the map.
4. Review the property's details, such as its parcel number or address, and whether the property is impacted by a flood zone.

Locate comparable sales

To determine fair market value of a subject or prospective property, the public and real estate professionals can use the Residential Comp Finder to look for properties with similar characteristics.

You will assume the role of a local homeowner. You want to find recently sold properties with similar characteristics to determine the value of your home.

1. In a browser, from the Equitable Property Value solution, view the Equitable Property Value ArcGIS Hub site.

2. Create a community identity or sign in with an existing user account.
3. Scroll to the **Get Involved** section and click **Get Involved** to follow the initiative.
Following the initiative gives you access to the Residential Comp Finder app.
4. Scroll to the **How does my property compare** section, and then click **Find Comps**.
The Residential Comp Finder app opens.
5. In the **Locate Sale** widget, search for a parcel number, address, or school district, or click the location directly on the map.
6. Optionally, adjust the buffer slider to see a larger list of potential properties.
7. Review the property's details, such as its address, parcel number, year built, floor area, assessed value, sale price, sales date, and sales ratio.
8. Optionally, use filters to refine the results; for example, use the **Sale Amount is between** filter to find homes with sale prices between \$250,000 and \$350,000.

Discover parcel and tax distribution information

Providing up-to-date and accurate information on taxes can help taxpayers know where their dollars go and allow local governments to operate with transparency. Using the Tax Parcel Viewer, the public can access property tax information and see where property tax dollars are being distributed, along with the amount of each distribution.

You will assume the role of a local homeowner. You want to find your property to see how your property taxes have been distributed.

1. In a browser, from the Equitable Property Value solution, view the Equitable Property Value ArcGIS Hub site.
2. Scroll to the **Property Applications** section, and then click **View Parcels**.
The Tax Parcel Viewer app opens.
3. On the right, in the **Search Parcels** widget, search for a parcel number, owner, or address, or click the location directly on the map.
4. Review the property's details, such as its address, parcel number, owner name, subdivision, structure types, and assessed and land values.
5. Review the tax distribution information to see how property tax from this parcel has been locally allocated.

Estimate tax liability and appeal assessment

To determine tax liability and review assessment of a property, property owners depend on the assessor's office to accurately determine and assess their property's value.

In this workflow, you will learn how to estimate tax liability and file a formal appeal of a property assessment.

Calculate estimated tax liability

Property owners can use the Tax Liability Calculator to compute their estimated tax liability.

1. In a browser, from the Equitable Property Value solution, view the Equitable Property Value ArcGIS Hub site.
2. Scroll to the embedded Tax Liability Calculator.
3. Complete the **Sale Price** field to see a property's estimated tax liability.

File a Property Tax Assessment Appeal

Property owners can use the Property Tax Assessment Appeal form to file a formal request for the review of their property assessment.

1. In a browser, from the Equitable Property Value solution, view the Equitable Property Value ArcGIS Hub site.
2. Create a community identity or sign in with an existing user account.
3. Scroll to the **Get Involved** section and click **Get Involved** to follow the initiative.
Following the initiative gives you access to the Property Tax Assessment Appeal app.
4. Scroll to the **How does my property compare section**, and then under **Start the Appeal Process**, click **Apply**.
5. Complete the Property Tax Assessment Appeal form, and then click **Submit**.