

The seal of the Texas Comptroller of Public Accounts is visible in the background. It features a central five-pointed star surrounded by a wreath of olive and oak branches. The words "THE COMPTROLLER" are inscribed in a circular border at the top, and "TEXAS" is at the bottom.

Glenn Hegar

Texas Comptroller of Public Accounts

Electronic Property

Transaction

Submission

Manual

Electronic Property Transaction Submission Manual

Background

Legal Requirement

Tax Code Section 5.07(c) requires appraisal districts (CADs) to maintain the property sales information they collect as part of their uniform record keeping systems. The CADs are required to submit the data to the Comptroller's office, where it is compiled into a statewide database.

In order to ensure uniformity in the data across the CADs, the Comptroller's Property Tax Assistance Division (PTAD) requires that all property transfers be submitted electronically in a prescribed format. The submissions will be due each year in February and August.

Uses for the Database

- Comptroller's Property Value Study (PVS);
- Public information for CADs and others; and
- Research

This information is used to identify valid sales for the PVS, which estimates the total taxable property value in school districts across the state. The Comptroller certifies these values to the Texas Education Agency, which uses the information in state funding calculations for each school district.

Independence of the PVS

To maintain the independence of the study, PTAD's field appraisers will continue to collect sales information on real property from multiple listing services, real estate professionals, businesses and property owners, in addition to the sales submitted by CADs. Wherever possible, the PVS uses accurate and verified sales information, rather than property appraisals, because sales are more objective, efficient and economical.

Submission Guidelines

Include All Property Transaction Records

The files submitted to PTAD are used primarily by our field appraisers to generate the warranty deed questionnaires about property transactions and to verify information on known sales. In order to accomplish both tasks, the field appraisers need information on ALL property transactions in the possession of the CADs for the time period requested. PTAD requires that both valid and invalid transactions be included and will perform routine screening and validity checks before using them in any analysis.

To ensure uniformity in the data, all property transfers must be submitted electronically in a prescribed format.

Include Transactions for the Required Time Period in Prescribed Record Format

The time period for the transactions begins Jan. 1 of the year prior to the submission date through the date of submission. The file must be in tab-delimited text (.txt), comma-delimited text (.csv) or Excel workbook (.xls or .xlsx) format.

Ensure that PTAD Receives Usable Files

PTAD can receive your property transactions file via the agency FTP site **privatesftp.texas.gov**. If you place a file on our FTP site, please notify us by email at **ptad.sss@cpa.texas.gov**. Alternatively, if the file is less than 5MB in size, you may send the file as an email attachment to **ptad.sss@cpa.texas.gov**.

Please name the file in the following format: **XXXEPTSMDDYY.txt** ('XXX' = CAD number and **MMDDYY** is the date the file is submitted).

The FTP site will not accept files with spaces in the file name.

PTAD also requests that each submission be accompanied by a *Media Information and Certification Form*. This form requires the signature of the chief appraiser certifying that all property transactions are included in the submission and that each field containing confidential information has been correctly identified. The form also provides important information about the number of records and the file format. Please list your deed type abbreviations in the appropriate place on the form. Please include the MICF with the file on the FTP site or attach it to the email. **Do NOT fax the MICF of deed type abbreviation list.**

An Important Change in Coding Confidential Information

The files we receive from each CAD are available to the public upon request in accordance with the Public Information Act. In order to make certain that PTAD is properly handling confidential information, we have expanded the coding scheme for Field 37—Confidential Code. Acceptable values and the description of which field contains confidential information for Field 37 are:

Acceptable Value	Description
A	parcel address (EPTS Field 7)
B	sale price (Field 10)
C	grantee address (Fields 22 and 23)
D	grantor address (Fields 29 and 30)
E	parcel address and sale price (Fields 7 and 10)
F	parcel address and grantee address (Fields 7, 22 and 23)
G	parcel address and grantor address (Fields 7, 29 and 30)
H	sale price and grantee address (Fields 10, 22 and 23)
I	sale price and grantor address (Fields 10, 29 and 30)
J	grantee address and grantor address (Fields 22, 23, 29 and 30)
K	parcel address, sale price and grantee address (Fields 7, 10, 22 and 23)
L	parcel address, sale price and grantor address (Fields 7, 10, 29 and 30)
M	parcel address, grantee address and grantor address (Fields 7, 22, 23, 29 and 30)
N	sale price, grantee address and grantor address (Fields 10, 22, 23, 29 and 30)
O	parcel address, sale price, grantee address and grantor address (Fields 7, 10, 22, 23, 29 and 30)
P	other confidential information
Q	no confidential information

Property transactions can be filed via the agency FTP site **privatesftp.texas.gov**.

Field 37 can only contain one of the codes listed above. The field cannot be left blank and must be coded Q if the record does not contain any confidential information. For any records coded P for other confidential information, you will need to submit a list by account number indicating each field that contains confidential data and the legal provisions under which confidentiality was granted.

EPTS files containing confidential data will have to be encrypted before they are sent to us. Many common software programs offer encryption including WinZip and 7-zip. This encryption is satisfactory if the password is sent to us by email at ptad.sss@cpa.texas.gov. **If you do not have access to any of these programs, please contact PTAD at 800-252-9121 to discuss possible alternatives.**

Common Errors to Avoid

There are two common errors CADs need to avoid. The first is the time period covered in each submission. February submissions should include all transactions that have occurred since Jan. 1 of the previous year. August submissions should also include all transactions that have occurred since Jan. 1 of the previous year. There is an overlap and CADs will be submitting some records more than once. It is possible that additional sales verifications have occurred and new details of transactions are available. It is important that PTAD have correct, up to date information.

The second common problem with submissions is that they do not include all transactions. Do not include just those transactions that have been verified or eliminate those transactions that have been determined not to be arms length. By receiving all transactions, PTAD has the opportunity to review and analyze data and make their own determinations about the validity of transactions.

Below are a few other common errors for the fields identified:

- **Confidentiality** – some files have been received with the confidentiality coded as yes, no, or unknown. PTAD is not allowed to change the confidentiality coding and our system requires the codes listed above. Also, please remember that the confidentiality code “P” requires an explanation of what is confidential and why.
- **Missing data** – please check to see if all the fields are in the data file.
- **Data in the wrong position** – please check to see that the data is in the correct position in the file, if a field is optional and you will not be submitting it, please insert a blank column or the appropriate number of characters for it.
- **Data formatted incorrectly** – please see the formatting requirements on the record layout and format your data accordingly.
- **Most recent appraised value not submitted.**

Help is Available

PTAD has developed an Excel spreadsheet for your use in preparing your submission. The spreadsheet, which is available at comptroller.texas.gov/taxes/property-tax/docs/EARSColumnHeaders.xlsx, contains a template with the PTAD’s column headers and an example of the correct format for each column (scroll down to the Sales Submission Record Format and click the XLS format link).

For assistance with your submission, you may contact the Data Analysis team at **800-252-9121** (press 2 and ask for DAT).

For help with your submission call the Data Analysis team at 800-252-9121 (press 2 and ask for DAT).

Electronic Property Transaction Submission Media Information and Certification Form (MICF)

Form 50-793

THIS FORM MUST BE COMPLETED WITH EVERY SUBMISSION.

Your submission will not be accepted if this form is not complete or if the submission does not comply with Electronic Property Transaction Submission Manual's record Layout. Email this form to: ptad.sss@cpa.texas.gov.

SECTION 1: Appraisal District Information

Appraisal District Name _____ District Number _____

Certification Date _____ Date Prepared _____

I certify that this submission contains all required information for all property transaction records held by this appraisal district for the specified time period, and that each field containing confidential information has been correctly identified.

Chief Appraiser Signature _____

SECTION 2: Contact Person Information

Name _____ Title _____

Current Mailing Address (number and street) _____ City, Town or Post Office _____ State _____ ZIP Code _____

Phone (area code and number) _____ Email Address _____

SECTION 3: Software Vendor Information (if applicable)

Name _____ Title _____

Current Mailing Address (number and street) _____ City, Town or Post Office _____ State _____ ZIP Code _____

Phone (area code and number) _____ Email Address _____

SECTION 4: Record Information

Number of records in submission: _____

Date Range of Transactions: ____/____/____ through ____/____/____

Abbreviations for Deed Types for Transactions

Deed Type	Abbreviation	Deed Type	Abbreviation
Example: General Warranty Deed	GWD		

SECTION 5: Type of Media

Name the file in the following format: XXXEPTSMDDYY.txt ('XXX' = CAD number, 'MMDDYY' = file submission date). Acceptable formats are .txt, .csv or Excel. Copy the file to the Comptroller's secure FTP site at privatesftp.texas.gov. If you are not already a registered user of this site, contact Leslie Adam at 512-305-9920 or leslie.adam@cpa.texas.gov.

Property Transaction Record Format

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
1	CAD_ID	CAD Code	Numeric	3	0	1	3	<p>The numeric identification code for each appraisal district as assigned by the Texas Comptroller's Property Tax Assistance Division. This three-digit code is unique to the appraisal district, not the county. The codes are used in the Texas Appraisal District Directory published by the PTAD. They run from "001" to "254". You are only sending data for your appraisal district, so this number should always be the same.</p> <p>EXAMPLE: 001 – Anderson County Appraisal District 002 – Andrews County Appraisal District</p>
2	TU_ID	School District Code	Numeric	6	0	4	9	<p>The Property Tax Assistance Division's assigned identification code for a taxing unit. The code number matches each taxing unit to its county name (1st 3 digits) and a unit within the county (2nd 3 digits). The Comptroller prints these numbers with the taxing unit's name in the Texas Appraisal District Directory each year.</p> <p>EXAMPLE: 001902 = Cayuga ISD</p>
3	PROP_CATG_CD	Comptroller's Category Code	Alphanumeric	2		10	11	<p>The code used by the Property Tax Assistance Division for the use category of the property. If the appraisal district uses different category codes, translate the district's code to the one below that best fits the property. Use one of the following codes:</p> <p>A – Single-family Residences B – Multi-family Residences C1 – Real Property: Vacant Lots and Tracts C2 – Real Property: Colonia Lots and Tracts D1 – Rural acreage qualified for productivity appraisal D2 – Rural acreage not qualified for productivity appraisal E – Farm and Ranch Improvements F1 – Commercial Real Property F2 – Industrial Real Property G – Oil, Gas and Mineral Property J – Utility Property 0 – (The letter "O", not zero)–Residential Inventory</p>
4	PROP_SHT_ID	Short Account Number	Alphanumeric	15		12	26	<p>This is sometimes called the "R Number" and is a locally assigned shortened account number.</p> <p>Example: R12345</p>
5	PROP_ID1_TX	Account Number	Alphanumeric	25		27	51	<p>The unique code (alphanumeric, numeric or alphabetic) that your district uses to identify a specific property. If more than one account is included in a transaction, a separate record should be submitted for each account.</p>
6	PROP_ID2_TX	Legal Description	Alphanumeric	200		52	251	<p>The property description found on formal documents; describes property in a manner that enables a person to locate it with government officials and is usually filed with the county clerk.</p> <p>Example: Lot 3, Block 1, Section 1 Hughes Tract</p>
7	PRCL_AD_TX	Parcel Address	Alphanumeric	50		252	301	<p>The situs or physical location of the property. The address includes the street, apartment or suite number (if any), city or other alphanumeric description for locating the property.</p> <p>Example: 100 West Main, Suite 100, Austin</p>

Property Transaction Record Format *(continued)*

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
8	PRCL_AD_ZP	Parcel ZIP Code	Numeric	5	0	302	306	The situs zip code. Example: 78750
9	SALE_DT	Sale Date	Date	10	0	307	316	The month, day and year of sale. Format: MM/DD/YYYY
10	PROP_SALE_AM	Sale Price	Numeric	12	0	317	328	The amount of consideration in whole dollars. If the sale price is unknown, a zero (0) value is entered. Example: 00000147500 Represents \$147,500
11	DEED_DT	Deed Date	Date	10	0	329	338	The month, day and year of the deed transaction. Format: MM/DD/YYYY
12	DEED_VOL_NR	Deed Volume	Alphanumeric	5		339	343	The volume number in which the deed of sale is recorded. Example: 01634 Represents Volume 1634
13	DEED_PAGE_NR	Deed Page	Alphanumeric	7		344	350	The page number in which the deed of sale is recorded or the film recordation number at the county clerk's office. Example: 0000182 Represents Page 182
14	DEED_NR	Deed Number	Alphanumeric	20		351	370	The deed number as recorded in the county clerk's office. Example: T18045615412315
15	DEED_TY_CD	Deed Type	Alphanumeric	12		371	382	Deed type of most recent transaction. Please note your abbreviation codes on your media information certification form (MIC). Example: GWD (General Warranty Deed) WDVL (Warranty Deed w/Vendor's Lien) CD (Contract for Deed) SWD (Special Warranty Deed)
16	MULT_ACCT_CD	Multiple Account Code	Alphanumeric	1		383	383	An indicator as to whether there are multiple accounts or multiple properties included in the transaction. Include in the comments fields the other account numbers that are included in the same sale. Enter "Y" or "N." If "Y", enter multiple account numbers in comment field.
17	SALE_PRIC_APRT_AM	Sale Price Apportioned?	Alphanumeric	1		384	384	Was the sale price apportioned? "Y" = Yes "N" = No "U" = Unknown

Property Transaction Record Format *(continued)*

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
18	OVLP_PROP_CD	Overlapping Property Indicator	Numeric	1	0	385	385	Does this property overlap into two appraisal districts? Enter "0" if the property is not overlapping Enter "1" if the property is overlapping and appraised by this CAD for the school district. Enter "2" if the property is overlapping but CAD does not appraise for school district.
19	TOTL_XMPT_CD	Totally Exempt Code	Alphanumeric	1		386	386	Is this property totally exempt from property tax? Enter "Y" if the property is totally exempt. Enter "N" if the property is not totally exempt.
20	GNTE_FRST_NM	Grantee First Name	Alphanumeric	50		387	436	First name of the buyer.
21	GNTE_LST_BUS_NM	Grantee Last Name or Business Name	Alphanumeric	50		437	486	The last name of the buyer or the business name. Example: Easeldorf or Wal-Mart Corp
22	GNTE_LINE_1_AD_TX	Grantee Address Line 1	Alphanumeric	35		487	521	Line one of buyer's address.
23	GNTE_LINE_2_AD_TX	Grantee Address Line 2	Alphanumeric	35		522	556	Line two of buyer's address, if needed.
24	GNTE_CITY_NM	Grantee City	Alphanumeric	24		557	580	Buyer's city.
25	GNTE_ST_CD	Grantee State	Alphanumeric	2		581	582	Buyer's state.
26	GNTE_AD_ZP	Grantee ZIP	Numeric	9	0	583	591	Buyer's ZIP.
27	GNTR_FRST_NM	Grantor First Name	Alphanumeric	50		592	641	The first name of the seller.
28	GNTR_LST_BUS_NM	Grantor Last Name or Business Name	Alphanumeric	50		642	691	The last name of the seller or the business name.
29	GNTR_LINE_1_AD_TX	Grantor Address Line 1	Alphanumeric	35		692	726	Line one of the seller's address.
30	GNTR_LINE_2_AD_TX	Grantor Address Line 2	Alphanumeric	35		727	761	Line two of seller's address, if needed.
31	GNTR_CITY_NM	Grantor City	Alphanumeric	24		762	785	Seller's city.
32	GNTR_ST_CD	Grantor State	Alphanumeric	2		786	787	Seller's state.
33	GNTR_AD_ZP	Grantor ZIP	Numeric	9		788	796	Seller's ZIP.
34	MAP_NR	Map Number	Alphanumeric	25		797	821	The CAD map number or the PID number for the plat. This may be the Geographical Information System (GIS) identification number for the property.

Property Transaction Record Format *(continued)*

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
35	CAD_VFCN_SRC_CD	CAD Verification Source Code	Alphanumeric	3		822	824	A three-character code to indicate how the sale was verified by the CAD. APP – Local Appraiser OWN – Property Owner SEL – Property Seller AGT – Real Estate Agent MLS – Multiple Listing Service DTI – Deed Transfer Information OTH – Other Source NOT – Not Verified
36	VALD_CD	Validity Code	Alphanumeric	1		825	825	Is this sale considered a valid “arms length” transaction? Enter “Y” or “N.” If unknown, enter “U.” If “N”, enter reason in comment field.
37	CNFD_CD	Confidential Code	Alphanumeric	1		826	826	What information about this sale is considered to be confidential information? Value – Description of Field containing Confidential Information A Parcel Address (Field 7) B Sale Price (Field 10) C Grantee Address (Fields 22 and 23) D Grantor Address (Fields 29 and 30) E Parcel Address and sale price (Fields 7 and 10) F Parcel Address and Grantee Address (Fields 7, 22 and 23) G Parcel Address and Grantor Address (Fields 7, 29 and 30) H Sale Price and Grantee Address (Fields 10, 22 and 23) I Sale Price and Grantor Address (Fields 10, 29 and 30) J Grantee Address and Grantor Address (Fields 22, 23, 29 and 30) K Parcel Address, Sale Price and Grantee Address (Fields 7, 10, 22 and 23) L Parcel Address, Sale Price and Grantor Address (Fields 7, 10, 29 and 30) M Parcel Address, Grantee Address and Grantor Address (Fields 7, 22, 23, 29 and 30) N Sale Price, Grantee Address and Grantor Address (Fields 10, 22, 23, 29 and 30) O Parcel Address, Sale Price, Grantee Address and Grantor Address (Fields 7, 10, 22, 23, 29 and 30) P Other Confidential Information Q No confidential information THIS FIELD MAY NOT BE LEFT BLANK AND MAY NOT CONTAIN ANY CODE OTHER THAN THE ABOVE. ANY RECORD CODED WITH “P” (OTHER CONFIDENTIAL MATERIAL) MUST HAVE AN EXPLANATION INCLUDED WITH THE MICF FORM OF WHAT IS CONFIDENTIAL AND WHY.

Property Transaction Record Format *(continued)*

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
38	FRZN_CHAR_CD	Frozen Characteristics	Alphanumeric	1		827	827	<p>An indicator as to whether the property characteristics have changed significantly between the sale date and the January first (lien date) being studied. This would indicate that the selling price of the property does not represent the value of the property on January 1.</p> <p>Enter "Y" or "N."</p> <p>Examples in which the indicator will be "N": A rundown house that sold in June was extensively remodeled prior to January 1; a commercial property that sold in October was severely damaged by a flood in late December; a lot that was vacant on January 1 sold with an improvement in May.</p>
39	CERT_VAL_YR	Most recent appraisal year	Numeric	4	0	828	831	<p>Most recent appraisal year</p> <p>Example "2008"</p>
40	ARB_VAL_CD	Value set by ARB	Alphanumeric	1		832	832	<p>Was the CAD value set by the appraisal review board?</p> <p>Enter "Y" or "N."</p>
41	PROP_RPTD_LAND_AM	CAD Value – Land	Numeric	12	0	833	844	<p>The appraisal district's current estimate of market value, in whole dollars, of the land for this property.</p> <p>Example: 00000147500 Represents \$147,500</p>
42	PROP_RPTD_IMP_V_AM	CAD Value – Improvement	Numeric	12	0	845	856	<p>The appraisal district's current estimate of market value, in whole dollars, of the improvement for this property.</p> <p>Example: 00000147500 Represents \$147,500</p>
43	PROP_RPTD_PPROP_AM	CAD Value – Personal Property	Numeric	12	0	857	868	<p>The appraisal district's current estimate of market value, in whole dollars, for the taxable personal property of the account.</p> <p>Example: 00000147500 Represents \$147,500</p>
44	PROP_RPTD_TOTL_AM	Total CAD Value	Numeric	12	0	869	880	<p>The appraisal district's current estimate of market value, in whole dollars, for the total appraised value of the property.</p> <p>Example: 00000147500 Represents \$147,500</p>
45	SQFT_IMP_V_QY	Square Footage – Improvement	Numeric	7	0	881	887	<p>Square footage of main improvement. For residential properties, provide square footage of living area. For commercial properties, provide total square footage.</p>
46	LAND_UNIT_TY_CD	Land Unit Type	Alphanumeric	2		888	889	<p>Unit used to value land. Examples:</p> <p>SF – Square Foot AC – Acre FF – Front Foot FV – Flat Value</p> <p>NA – Not Applicable</p>
47	LAND_UNIT_QY	Number of Land Units	Numeric	14	4	890	903	<p>Number of land square feet, acres, etc.</p> <p>Example: 00000016.8250 Represents 16.825 Units</p>

Property Transaction Record Format *(continued)*

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
48	BDRM_QY	Number of Bedrooms	Numeric	1	0	904	904	Number of bedrooms (if applicable).
49	BTHRM_QY	Number of Bathrooms	Numeric	5	2	905	909	Number of bathrooms (if applicable). Example: 03.50 Represents 3 1/2 Baths.
50	CA_CH_CD	CACH?	Alphanumeric	1		910	910	Does main improvement have central air conditioning and heating? Enter "Y" or "N." If land only account, enter "L."
51	BUILT_YR	Year Built	Numeric	4	0	911	914	Year of construction of main improvement in YYYY format.
52	CSTC_CLAS_TY_CD	Construction Type/Class	Alphanumeric	10		915	924	Appraisal district code for construction type/class of main improvement. Examples: RV7+ = residential veneer class 7 plus RF3+ = residential frame class 3 plus C-CB3 = commercial concrete block class 3 C-TW4 = commercial tilt wall class 4
53	STRS_QY	Number Stories	Numeric	6	2	925	930	Number of stories of main improvement. Example: 02.50 Represents 2 1/2 Stories.
54	SBDV_NBHD_CD	Market Area	Alphanumeric	15		931	945	CAD code that identifies the market area. A code attached to each of a group of parcels the appraisal district has identified as being in a market area. A market area is one or more geographic areas in which similar properties compete with each other for potential buyers. The geographic areas in a market area may be non-contiguous.
55	FNC_CD	Financing Code	Alphanumeric	5		946	950	Code or abbreviation to indicate how the sale was financed. Example: FHA, VA, Owner, Conv
56	DY_ON_MRKT_QY	Number of Days on Market	Numeric	3	0	951	953	Number of days the property was listed on the market.
57	PREV_RPD_LAND_AM	Previous CAD Value – Land	Numeric	12	0	954	965	The appraisal district's prior year estimate of market value, in whole dollars, of the land for this property. Example: 00000014750 Represents \$147,500
58	PREV_RPTAD_IMP_AM	Previous CAD Value – Improvement	Numeric	12	0	966	977	The appraisal district's prior year estimate of market value, in whole dollars, of the improvement for this property. Example: 00000014750 Represents \$147,500
59	CAD_LINE_1_CMNT_TX	CAD Comments	Alphanumeric	50		978	1027	This is the first of two lines of 50 characters in which you may provide additional information about the sale. Example: Multiple account codes or reason for validity code of "N."

Property Transaction Record Format *(concluded)*

Field #	PTAD Column Header	Field Name	Type	Length (Total)	Decimal Places	Begin Position	End Position	Description
60	CAD_LINE_2_CMNT_TX	CAD Comments	Alphanumeric	50		1028	1077	This is the second of two lines of 50 characters in which you may provide additional information about the sale. Example: Multiple account codes or reason for validity code of "N."
61	INT_RATE_PC	Interest Rate	Numeric	4	2	1078	1081	The interest rate applied to the loan amount.
62	YR_FNC_QY	Number of Years Financed	Numeric	2	0	1082	1083	The term, or number of years, of the loan.
63	DN_PMT_AM	Down Payment	Numeric	12	0	1084	1095	The down payment in whole dollars.

Count: 63, Total: 1,095

For more information, visit our website:
comptroller.texas.gov/taxes/property-tax

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