



**ANN HARRIS BENNETT**

Tax Assessor-Collector & Voter Registrar

[www.hctax.net](http://www.hctax.net)

# *2024 TAX STATEMENT PROCESSING PACKET*

## Mortgage Department

Harris County Tax Assessor-Collector  
1001 Preston, Room 310  
Houston, Texas 77002

Contact: Marsan Taylor, Mortgage Department  
[marsan.taylor@tax.hctx.net](mailto:marsan.taylor@tax.hctx.net)



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July 23, 2024

Dear Lender/Agent Companies,

As we transition into the 2024 tax year, **the Harris County Tax Assessor-Collector's office will be accepting 2024 tax statement requests only through its Commercial Portfolio site at [www.hctax.net](http://www.hctax.net).**

*Harris County Tax Office is estimating that 2024 billing will occur in mid-November 2024.*

**Please note the deadline for submitting your requests will be Friday, September 13, 2024.**

*The enclosed packet includes instructions and tips to guide you through the process of requesting and receiving your 2024 tax statements. Procedures for submitting your tax payments will be sent to you with your tax statement/file requests. This packet contains the following:*

- Tax Statement Request Procedures
- Lender/Agent Request Form
- Commercial Portfolio Procedures
- Electronic Data File Specifications for Statement Request
- Converting Account Numbers

Please note that if a property account is requested, the property owner of that account will not receive a tax statement. Therefore, we encourage you to review the accounts in your portfolio for accuracy before submitting your request for tax statements and delete any accounts you will not be paying.

We are available to help should you have additional questions relating to your tax statement request process. Please contact Marsan Taylor at (713) 274-8047 or [marsan.taylor@tax.hctx.net](mailto:marsan.taylor@tax.hctx.net) for more information about tax statement request procedures, data file format, or other details concerning this process.

Sincerely,

## Marsan Taylor

ACT Sr. Technical Analyst  
Information Technology  
Administration Division  
Office of Ann Harris Bennett  
Tax Assessor-Collector  
Phone: 713.274.8047  
Email: [marsan.taylor@tax.hctx.net](mailto:marsan.taylor@tax.hctx.net)

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# TAX STATEMENT REQUEST PROCEDURES

*Tax Statement requests are due by Friday, September 13, 2024*

## Rules for Request Submission

**ATTENTION:** Tax statement requests submitted via mail, email, hand-written requests, or computer listings are no longer accepted. These types of requests will be returned incomplete to the sender for resubmission through the Commercial Portfolio site at [www.hctax.net](http://www.hctax.net).

- **The Tax Statement Request process is available for current taxes only.**
- **Do not include requests for delinquent taxes or Vehicle Inventory taxes.**
- **The Harris County Tax Office is only accepting tax statement requests through its Commercial Portfolio site. More information is available at [www.hctax.net](http://www.hctax.net)**

The **LENDER/AGENT REQUEST FORM** located on page 5 must be completed and returned. The information provided in your Lender/Agent request form will be used to update our records and ensure proper processing of your tax statement requests. To ensure the timely processing of your 2024 tax statement requests, **we request that you return this form to the Harris County Tax Office no later than Friday, September 13, 2024.**

Please include your four-digit **County User/Lender ID** number (found on the cover page). This is required information and must be included with all correspondence. If your code is only 3 digits, add a leading zero.

**Example:** *If your Lender ID number is 140, your data should be entered as 0140.* Service companies and agents **must** complete and submit the *Lender/Agent Request Form* (page 5) for **each** company they are representing. Please be sure the information is up-to-date and accurate.

*Mail or Email your Lender/Agent request form to:*

Harris County Tax Assessor-Collector's Office  
Attention: Marsan Taylor, Mortgage Department  
1001 Preston, Room 310  
Houston, Texas 77002  
[marsan.taylor@tax.hctx.net](mailto:marsan.taylor@tax.hctx.net)

**Note:** Please **double check** all your requests to verify that you have requested **ONLY** those accounts for which your company is responsible for making payments.

**If you request an account in error, the taxpayer of that account will not receive a tax statement!**

**Lender/Agent Request Form - Must be returned to insure proper processing of your request.**

Please review and verify your company information below. This is the contact information on our records and will be used to forward Tax Statements and other correspondence. If this information is incorrect, please make the necessary corrections to update your company profile/contact. If you would prefer to have Tax Statements and listings, be sent to a different address, please indicate so in the *Alternate Mailing Address* space below.

9999

Company Name

Attn:

Mailing Address

City, State Zip

(Alternate Mailing Address)

**Company Profile**

Contact Person(s): \_\_\_\_\_

Telephone Number (\_\_\_\_\_) \_\_\_\_\_ Fax Number (\_\_\_\_\_) \_\_\_\_\_

Email Address\*: \_\_\_\_\_

Does your company use a data service provider? Yes  No

If yes, name \_\_\_\_\_

Telephone# (\_\_\_\_\_) \_\_\_\_\_

**Statement Requests**

All requests are to be submitted using the Commercial Portfolio. See following page for instructions.

- Please select statement type and delivery method.

A. Data File: \*Emailed  \*FTP

B. Printed Tax Statement: Mailed  Picked Up

C. None of the above:

\*If FTP or Email please provide email address or FTP site path and login

\_\_\_\_\_  
\_\_\_\_\_

- Does your company want a listing of the billed accounts? Yes  No

## Commercial Portfolio Procedures

The Harris County Tax Assessor-Collector's office provides the Commercial Portfolio interface on our website to initiate, view, add, and/or update your accounts. Using this feature, you will be able to monitor and maintain your accounts, make your statement requests online and/or pay based on this Commercial Portfolio.

**If you used the Commercial Portfolio in the past, those accounts are still stored in your portfolio. Please review and update your contact information and the tax accounts in your portfolio.**

Currently, the website will display 2023 tax year data for any account already in your portfolio or new accounts that you add.

*The tax rates for the jurisdictions for which the Harris County Tax Assessor-Collector's Office collects must be set 60 days after the tax roll is received from the Harris County Appraisal District. As soon as this data is available, we will load 2024 tax year data for the accounts that you have requested.*

Your County User/Lender ID is: **9999**

To access the Commercial Portfolio, use the URL below or go to [www.hctax.net](http://www.hctax.net), click on **Property Tax** and then **Commercial Portfolio**.

URL for the Commercial Portfolio is: <https://www.hctax.net/Portfolio/MortgageAcct>

Setting up and accessing your portfolio:

- Your Lender ID is your login to the portfolio. If you are new to the portfolio or forgot your password, you will be allowed to create or reset it on the login screen.
- Accounts may be added to your portfolio by uploading a text, excel or csv file in the designated format or by manually entering each account. (See page 8)
- Review and verify the accounts in your portfolio before submitting your request for tax statements. If you request an account in error, the taxpayer of that account will not receive a tax statement.

## Electronic Data File Upload Specifications for Statement Requests

### Microsoft Excel, CSV, and TXT

Please place each field listed in a separated column as specified below:

#### Request File Format

Column Name	Column Number (s)	Entry
Account	01 -13	13-digit numeric account number (No dashes, spaces or special characters)
Filler	14 -14	1 position space (blank or “,”) (only needed if you are including a loan number in your data)
Loan number	15 -29	15-character loan number (optional) (For your identification purposes)

- Account numbers should be formatted as text to preserve leading zeroes.
- No column headings or totals are allowed.

### Sample Text Formats:

0031780000014,0026391532

0031780000014 0026391532

0031780000014

### Sample Excel Formats:

	A	B
1	0031780000014	0026391532
2	0031780000014	
3		
4		

- If manually entering your information a template will be provided.
- Once you have uploaded and verified your accounts, click on the submit **Statement Requests** button. This will forward your request to the tax office for statement processing once the tax bills are available.

### IMPORTANT

**If you service accounts in any of the jurisdictions listed below, refer to page 9 for the account number conversion format before proceeding:**

- **Harris County Appraisal District Personal Property, Mineral, Pipeline, Intangible and Utility accounts**
- **Ft. Bend and Montgomery County Appraisal District accounts.**

## Conversion of Harris County Appraisal District Personal Property Accounts

The Harris County Appraisal District (HCAD) assigns 7-digit account numbers to personal property, mineral, pipeline, intangible, and utility accounts. The Harris County Tax Assessor-Collector’s Office adds a single digit prefix to the HCAD number and five zeroes as the suffix, thus converting the 7-digit number to 13 digits.

The following criteria are used to determine the prefix. Conversions shown below are for account ‘1234567’:

Account Type	Tax Office Prefix	Tax Office Suffix	Account Number
Personal Property accounts	2	00000	2123456700000
Mineral accounts	4	00000	4123456700000
Pipeline & Utility accounts	5	00000	5123456700000

## Conversion of Ft. Bend and Montgomery County Accounts

Typically, the property ID for either Ft Bend or Montgomery County contains a leading letter followed by 6 or 7 numbers. Harris County will convert that number into a 13-digit account number, using these business rules:

- All new account numbers will drop the leading letter** from the property ID and **replace** it with, a **two-digit leading number** as follows:
  - Ft. Bend County: ‘01’ for **Real** Property and ‘99’ for **Business** Personal.
  - Montgomery County: ‘02’ for **Real** Property and ‘98’ for **Business** Personal.
- Five (5) trailing zeroes will be added at the end.
- For accounts with **less than 6** numbers in the property ID, the necessary number of **leading zeros** will be added after the leading number to create a 13-digit number, as shown below.

	Fort Bend County		Montgomery County	
	Business Personal Property			
# Digits	Before: A, P, V	After: 99	Before: P, N	After: 98
7	P123456	9912345600000	P112233	9811223300000
6	P12345	9901234500000	P11223	9801122300000
5	P1234	9900123400000	P1122	9800112200000
	Real Property			
# Digits	Before: C, M, N, R	After: 01	Before: M, R	After: 02
7	R543210	0154321000000	R332211	0233221100000
6	R43210	0104321000000	R33221	0203322100000
5	R3210	0100321000000	R3322	0200332200000