Quick Reference Guide: POPLAR Appeal Submission

POPLAR Appeal Submission

The Portal for Online Property Legal Appeal and Review (POPLAR) allows taxpayers who have already filed an appeal with their county's Property Tax Assessment Board of Appeals (PTABOA) to appeal that decision online to the IBTR. You must have an Access Indiana account before you can utilize POPLAR for purposes of submitting and managing appeals with the IBTR. This Quick Reference Guide (QRG) will review the steps required to submit an appeal on POPLAR.

Start a Petition

A Taxpayer may file a new appeal with IBTR after first appealing to the county property tax assessment board of appeals (PTABOA). POPLAR cannot be used to file initial PTABOA appeals. To enter a new petition, follow these steps:

- 1. As an authenticated/registered 'Party' user, login to POPLAR (https://www.in.gov/ibtr/poplar).
- 2. By default, the POPLAR page for 'Party' users (Petitioners, Respondents, Authorized Representatives) is the **My Petitions/Appeals** home page upon login.
- 3. On the navigation bar at the top of the page, select START A PETITION (see Figure 1).

Figure 1 – Navigation Bar – START A PETITION



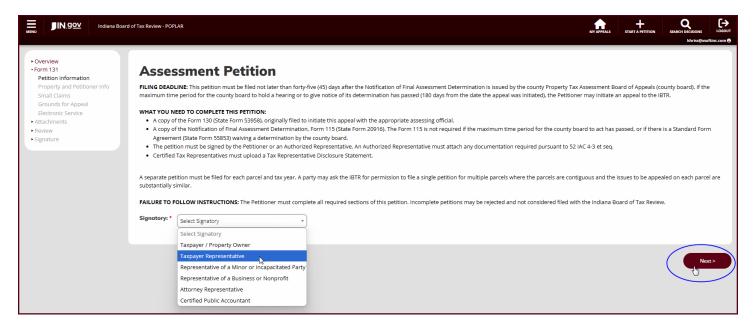
- 4. The Start a Petition page will open where the user will be presented with two options:
 - a. Start a New IBTR Petition; and
 - b. Finish a Saved IBTR Petition
- 5. Select the first option to initiate a new petition. The second would be used to navigate back to the **My**Petitions/Appeals page, where the user could edit a draft petition, one that is already in progress but not submitted.
- 6. The **Choose a Petition Type** page will open where the user will be presented with the two options:
 - a. Start a Form 131 Petition: and
 - b. Start a Form 132 Petition
- 7. Select the Form 131 option to appeal a decision regarding assessed values, homesteads, deductions, credits, and classifications. Select the Form 132 option to appeal a decision regarding charitable, religious, educational, and other statutory exemptions.

Note: The following may vary from your experience depending on the petition type selected and how questions are answered.

8. Selecting either the Form 131 option or the Form 132 option will open the **Overview** page. Here you will find further instructions on entering a petition. Select the appropriate *Signatory* type and choose the *Next* button (see Figure 2).

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Figure 2 – Petition Overview

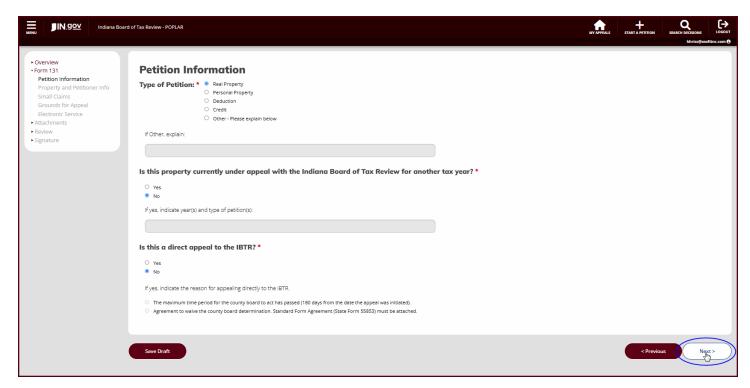


9. The **Petition Information** page will open. Complete the required fields, indicated by the red asterisk, and choose the *Next* button upon completion (see Figure 3).

Note: Navigating to the Previous or Next pages will automatically save the data entered on the current page. Also, the Save Draft button can be used to immediately save the data entry if the user wishes to remain on the current page.

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Figure 3 – Petition Information

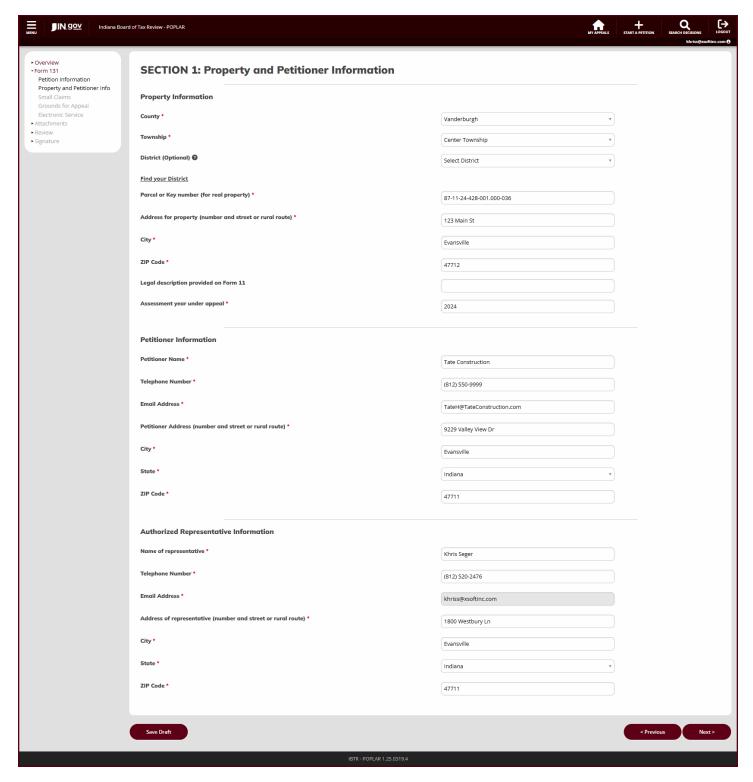


Note: Indicating that the petition is a direct appeal to the IBTR will impact the document attachment requirements. Be sure to have digital copies of any required documentation such that it maybe transmitted with the petition submission.

10. **Section 1: Property and Petitioner Information** will open. Complete the required fields, indicated by the red asterisk, and choose the *Next* button upon completion (see Figure 4).

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Figure 4 - Section 1: Property and Petitioner Information

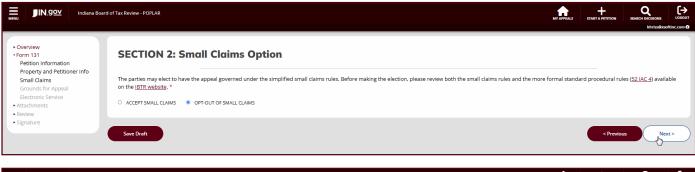


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Note: If the Signatory is entered as an authorized representative, the email address for the representative will be captured from the user profile. Otherwise, it is the petitioner's email address field that will utilize the user profile email.

11. **SECTION 2: Small Claims Option** page will open. Complete the required fields, indicated by the red asterisk, and choose the *Next* button upon completion (see Figure 5). If a Form 132, the user will see **SECTION 2: Action by County PTABOA**.

Figure 5 – Section 2: Small Claims Option or Action by County PTABOA

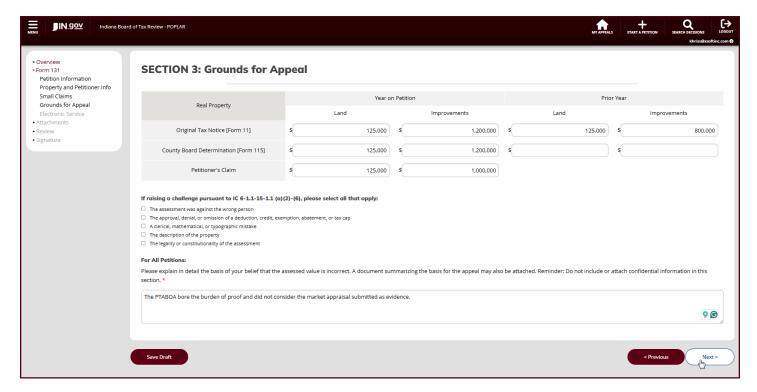




12. **SECTION 3: Grounds for Appeal** page will open. Complete the required fields, indicated by the red asterisk, and choose the *Next* button upon completion (see Figure 6).

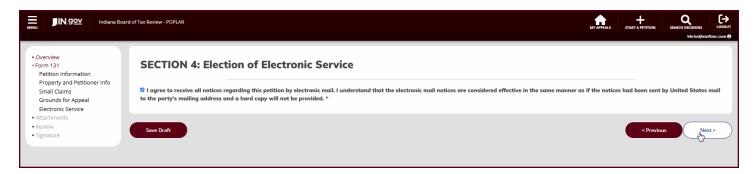
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Figure 6 – SECTION 3: Grounds for Appeal



13. **SECTION 4: Election of Electronic Service** page will open. Complete the required fields, indicated by the red asterisk, and choose the *Next* button upon completion (see Figure 7).

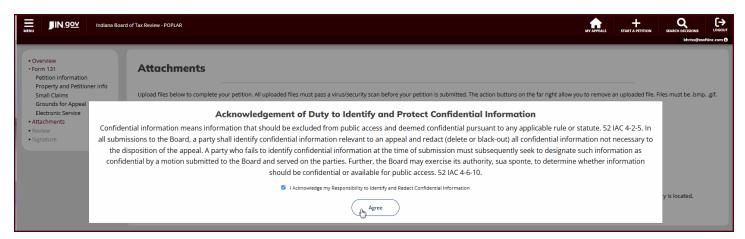
Figure 7 - SECTION 4: Election of Electronic Service



- 14. The **Attachments** page will open, and the user will be prompted to **Acknowledgement of Duty to Identify and Protect Confidential Information** (See Figure 8).
- 15. Review the acknowledgement and upon selecting the provided checkbox, choose the *Agree* button (see Figure 8)

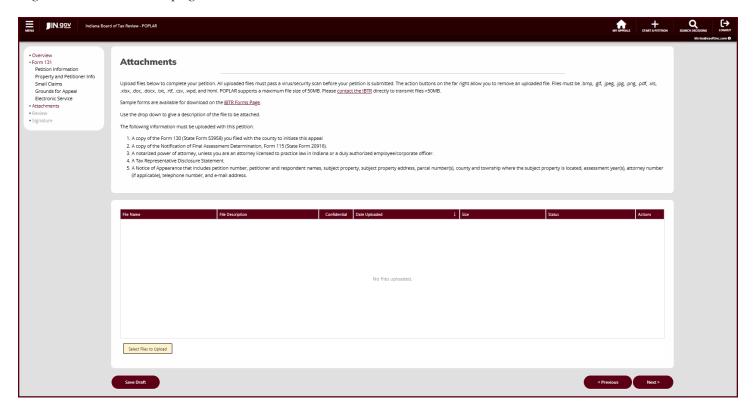
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Figure 8: Attachments - Protect Confidential Information



16. Review the guidance provided at the top of the page, especially the requirements section pertaining to documents necessary to complete the petition submission. Again, document attachment requirements are dictated by the petition type selected and how questions are answered in prior sections. (see Figure 9).

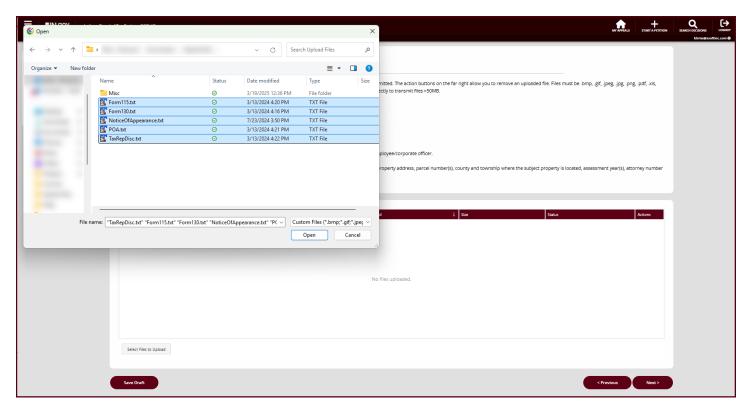
Figure 9 – Attachments page



17. Using the *Select Files to Upload* button, choose files that are to accompany the petition submission and select *Open* in the file select window (see figure 10).

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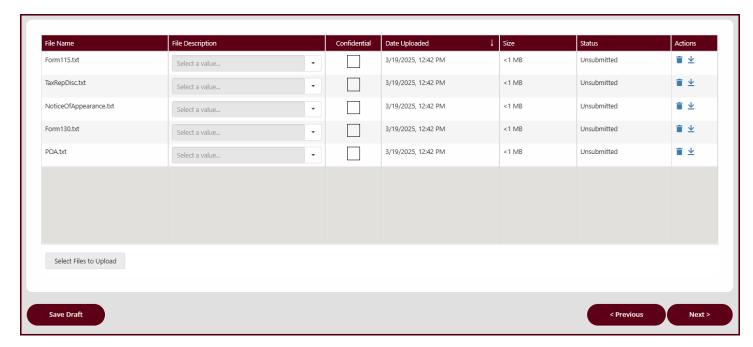
Figure 10 – Select Files to Upload



18. All selected files will be scanned for malicious content (antivirus scan) and subsequently uploaded to the POPLAR document repository (see Figure 11). Files that fail the antivirus scan will be indicated on screen and must be removed before advancing to the next screen.

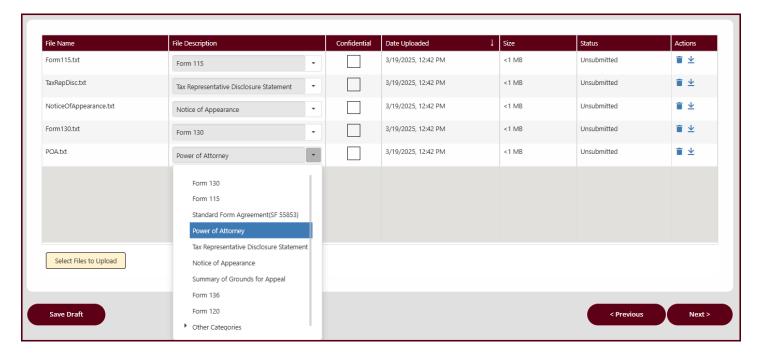
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Figure 11 – Uploaded Document Attachments



19. POPLAR requires that each file uploaded to the document repository have a *File Description*, second column. From the available options, using the drop down picklist in the file description field of each attachment, select the description that best describes the document being uploaded. File descriptions for the most commonly uploaded files are conveniently placed near the top of the picklist (see Figure 12).

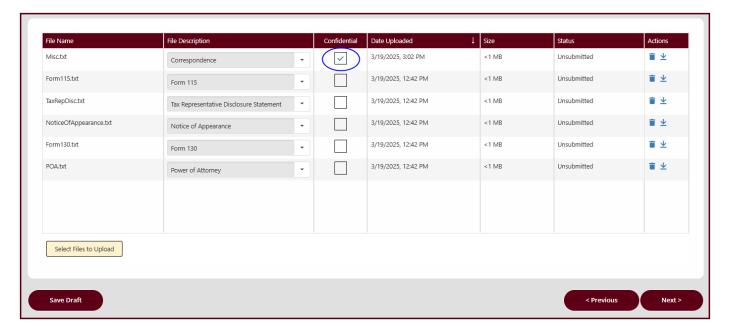
Figure 12 – File Description Picklist

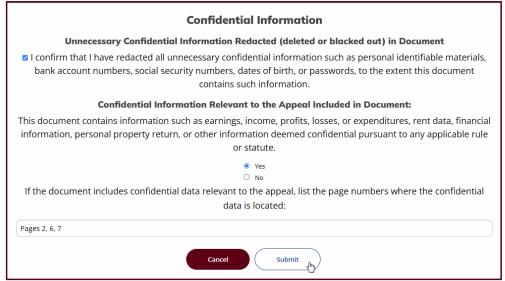


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20. Should an attached document contain information such as earnings, income, profits, losses, or expenditures, rent data, financial information, personal property return, or other information deemed confidential pursuant to any applicable rule or statute, it is incumbent upon the user to complete the *Confidential* acknowledgment. To do this, select the checkbox in the *Confidential* column for the subject record and complete the confidentiality prompt (see Figure 13).

Figure 13 – Confidential Checkbox and Acknowledgement





21. Once all required documentation has been attached, choose the *Next* button upon completion. Before advancing, you will be prompted to complete an **Acknowledgement of Service.**

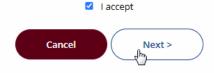
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22. Review the acknowledgement and upon selecting the provided checkbox, choose the *Next* button (see Figure 14).

Figure 14 - Acknowledgement of Service

Acknowledgement of Service

By submitting these documents, you accept and acknowledge that a notice of this filing will be forwarded to the parties associated with the petition(s) identified in the submission. Copies of these documents will be available to parties within POPLAR.

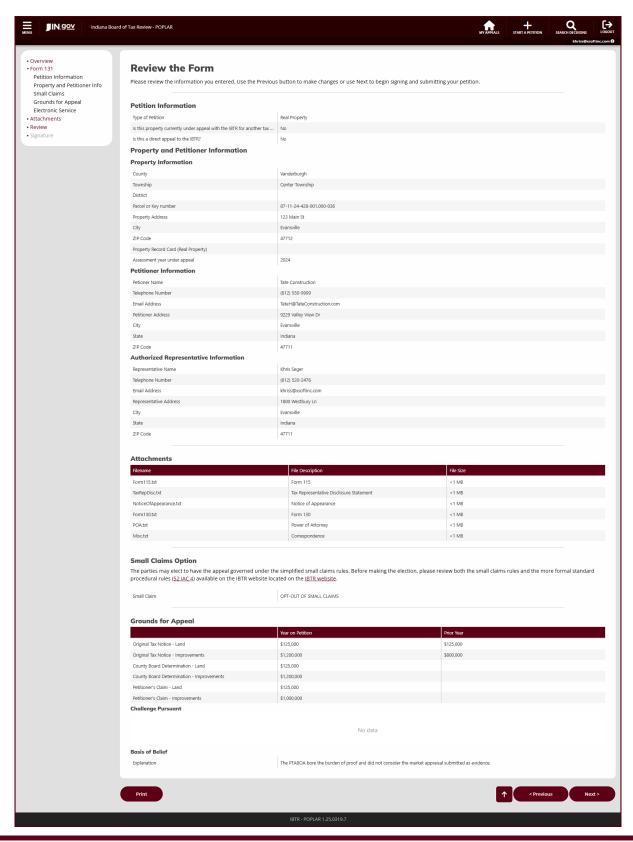


Note: Subsequent to this submission and once processed by the IBTR, additional documents may be added to the appeal. Future document uploads will result in an email notification to all parties to the appeal.

23. The **Review the Form** page will open. Review the information entered and use the *Previous* button to make changes or use *Next* to begin signing and submitting your petition. (see Figure 15).

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Figure 15 – Review the Form

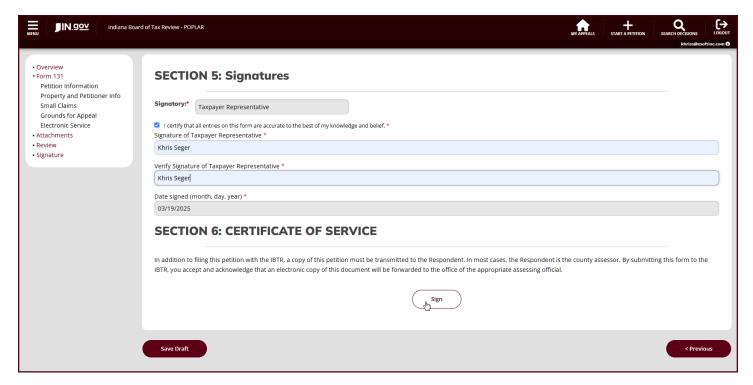


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Important: Utilize the Print button at the bottom of the page to create a digital record of your submission.

24. Selecting *Next* on the **Review the Form** page will advance you to the **Signature** (**Section 5 & 6**) page. Here, complete the required fields, indicated by the red asterisk, and choose the *Sign* button upon completion (see Figure 16).

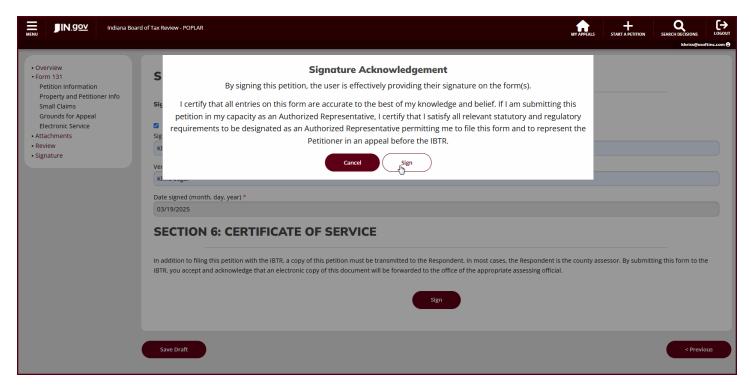
Figure 16 – Signature (Section 5 & 6)



25. You will be asked to complete the **Signature Acknowledgement** as the final step to submitting the petition. Review the acknowledgement and choose *Sign* to advance (see Figure 17).

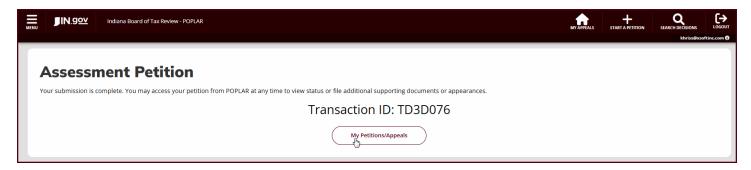
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Figure 17 – Signature Acknowledgement



26. Confirmation that the petition has been submitted to the IBTR for review comes in the way of the **Assessment Petition** confirmation page (see Figure 18). Retain the provided <u>Transaction ID</u> for future your records.

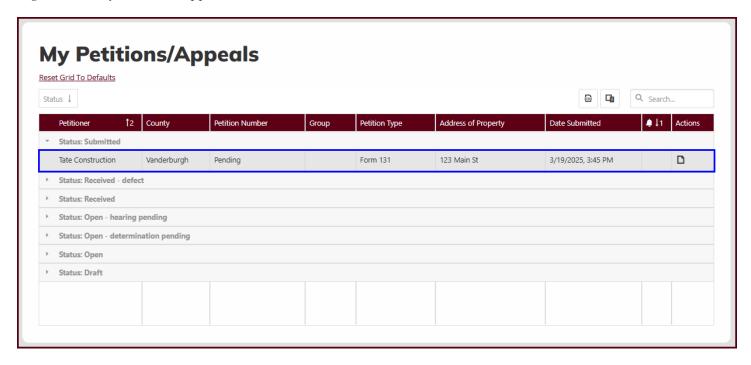
Figure 18 – Assessment Petition Confirmation



27. The *My Petitions/Appeals* button will return you to the Home page, where you can further verify the submission of the subject petition as well as manage other records to which you are a party (see Figure 19).

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Figure 19 – My Petitions/Appeals



Note: The newly submitted petition must be processed and accepted by the IBTR before it becomes an active appeal. Once it receives a 'Open', a PDF version of the Form131/132 will be generated and made available on the record in POPLAR. Also once accepted, you will be notified by email and granted access to the appeal detail in POPLAR.