

Preparing & Uploading Your Historical Cases

A step-by-step guide to bulk-importing cases via CSV — available anytime at rbamgr.com/import

What This Is

If you handled arbitration cases before joining rbamgr.com, you don't have to re-enter them one at a time. You can bulk-upload your historical cases using a CSV spreadsheet — a simple, universal file format that Excel, Google Sheets, and Numbers can all open and save. This page is available any time, for as many batches as you need, at rbamgr.com/import.

Before You Start

- 1. Download the CSV template.** Use the "Download CSV Template" button on the import page, or the sample file provided with this guide. It already has the correct column headers in the correct order — don't rename, reorder, remove, or add columns.
- 2. Gather your case records.** Pull together whatever records you have for each historical case — prior spreadsheets, PTAD filings, correspondence, etc. — so you have the details on hand to fill in each row.
- 3. One row per case.** Each row in the spreadsheet becomes one case in your account once imported.

Important: There is currently no duplicate-detection check. If you upload the same file twice, or upload overlapping data in two different files, you will end up with duplicate case entries. Double-check your CSV before uploading, and don't re-upload a file you've already imported.

Filling In Your CSV

General rules: keep the column headers exactly as provided, leave a cell blank if a column doesn't apply or you don't have that information (only a few columns are required — see below), and save your file as **.csv** (not .xlsx or .numbers) before uploading.

Column	Required ?	What to enter
File Number	No	Leave blank to auto-assign, or enter your existing number (e.g. 2024-014). See File Number Handling below.
Arbitration Number	Yes	The number assigned by the Comptroller (e.g. RBAE-018221).
Appraisal District Arb #	No	The CAD's own tracking number, if any.
Status	Yes	Must exactly match one of the values listed in "Valid Status Values" below.
Property Address	Yes	Full street address of the property under appeal.
County	Yes	County where the property is located.
Tax Account Number	No	The appraisal district's account number for the property.
Property Type	No	Residential, Commercial, or Land.
Tax Year	No	The tax year under appeal (e.g. 2024).

Column	Required ?	What to enter
Homestead Exemption	No	Yes or No.
Appeal Value Type	No	Market Value or Unequal Appraisal.
Property Owner Name	Yes	Full name of the property owner.
Property Owner Email	No	Property owner's email address, if known.
Property Owner Phone	No	Property owner's phone number, if known.
Tax Agent Name	No	Name of the property owner's tax agent, if one was involved.
Tax District Name	No	Name of the taxing/appraisal district (e.g. Travis Central Appraisal District).
ARB Order Received Date	No	Date you received the ARB order. Format: YYYY-MM-DD (e.g. 2024-02-10).
PO Opinion of Value	No	Property owner's opinion of value, numbers only (e.g. 285000).
ARB Determined Value	No	Value determined by the ARB, numbers only.
Hearing Type	No	In-Person or Teleconference.
Deposit Amount	No	Deposit amount on file with the Comptroller, numbers only.
Arbitrator Fee	No	Your actual fee per the Comptroller, numbers only.
Verdict	Conditiona l	Only fill in if the case is closed — see “Valid Verdict Values” below.
Arbitrator's Awarded Value	No	Your final determined value, numbers only.
Date Determined/Closed	No	Date the case was determined or closed. Format: YYYY-MM-DD.

Column	Required ?	What to enter
Created Date	No	The real date you originally opened this case, if you want to preserve it. Format: YYYY-MM-DD. Leave blank to use today's date instead.

Valid Status Values

The Status column must match one of these values **exactly** (spelling, spacing, and capitalization all matter). This is the single most common reason a row gets rejected during import.

Pipeline statuses (in order):

- Accepted
- Schedule Request Email Sent
- Schedule Confirmation & Procedures Email Sent
- Hearing Scheduled
- Initial Evidence Received
- Rebuttal Evidence Received
- Hearing Complete
- Ruling Complete — TX Comp Site Updated
- Payment Received
- File Closed

Terminal statuses (a case that ended without completing the pipeline):

- Dismissed
- Withdrawn Untimely

Valid Verdict Values

Only fill in the Verdict column if the case has actually been decided — i.e. Status is **File Closed**, **Dismissed**, or **Withdrawn Untimely**. If Verdict is filled in but Status isn't one of those three, the row will still import, but you'll see a warning in the preview.

- Determined in Favor of Property Owner
- Determined in Favor of Appraisal District

- Dismissed
- Withdrawn Untimely

File Number Handling

When you upload, you'll choose one of two modes for the File Number column:

Preserve historical numbers (recommended, default): Keeps whatever File Number you entered in the CSV. Use this if your old numbers mean something to you — correspondence, filings, etc. Leave the cell blank for any row where you don't have or don't care about a specific number, and one will be assigned automatically for just that row.

Auto-assign: Ignores whatever is in the File Number column entirely and assigns new sequential numbers to every row, in the order they appear in your file.

Uploading Your File

1. Go to rbamgr.com/import and sign in.

Use your usual RBA login.

2. Choose your File Number mode.

Preserve is selected by default — switch to Auto-assign if you'd rather not use your old numbering.

3. Upload your CSV.

Drag and drop the file onto the upload area, or click it to browse for the file on your computer.

4. Review the preview table.

Every row from your file is listed with a status: Valid (green), Warning (amber, will still import), or Error (red, will be skipped). An error count banner appears at the top if anything needs attention.

5. Fix or proceed.

If you see errors, you can fix your CSV and re-upload it, or click “Import Valid Rows” to import everything that passed and skip the rest — skipped rows are never silently dropped without explanation.

6. Review the import summary.

After importing, you'll see how many cases were imported and how many were skipped, with the specific reason for each skipped row.

What Happens After Import

Imported cases appear in your dashboard alongside the rest of your caseload — there's no separate “imported” section to check. There is no undo once you click

“Import Valid Rows,” so use the preview step to catch problems first. You can return to rbamgr.com/import any time to bring in another batch — there's no limit on how many times you can use this page.

Common Mistakes to Avoid

- Status values that don't match the list exactly — extra spaces, different capitalization, or made-up statuses are the most common cause of rejected rows.
- Renaming, reordering, or deleting columns in the template.
- Saving the file as .xlsx or another format instead of .csv.
- Uploading the same file twice, or overlapping files — there is no automatic duplicate check in this version.
- Filling in Verdict for a case that isn't actually closed yet.

Questions about importing your historical cases? Reach out any time at john@rbamgr.com.