



Becoming a Local Sponsor of State Courses and/or Continuing Education // 2017

Consider becoming a local sponsor of state certification courses or continuing education to provide cost-effective training in your local area! It's very simple, and we are happy to help walk you through the process. Better yet . . . it's free.

TAAD has prepared step-by-step directions for the process:

- Complete the paperwork required by TDLR
- Submit paperwork to TDLR and wait for approval
- Secure class materials from PTEC, notify TDLR of classes to be offered
- Conduct the class
- More paperwork to finish up
- Pay your PTEC licensing fee
- File your end of class credit report online with TDLR
- Done!

The necessary paperwork

Step one: Decide whether you'll offer core courses (the courses taken to achieve certification) or continuing education offerings, or both.

If you plan to offer core courses, file a **TDLR Property Tax Professionals "Core" Provider Application**. (The form and instructions are available here:

<https://www.license.state.tx.us/taxprof/PPTCOREPROAPPLINSTR.pdf>)

This is a signed agreement between you and TDLR regarding the duties and responsibilities of being a sponsor of core courses. Complete, sign/date the bottom portion, then mail, email or fax to:

TDLR
PO Box 12157
Austin, TX 78711-2157
Fax 512/463-1512
education@tdlr.texas.gov

If you plan to offer continuing education, file a **TDLR Property Tax Professionals Continuing Education Provider Registration**. (The form and instructions are available here:

<https://www.tdlr.texas.gov/ce/forms/ptpceproviderapp.pdf>) This is a signed agreement between you and

TDLR regarding the duties and responsibilities of being a sponsor of continuing education. Complete, sign/date the bottom portion, then mail, email or fax to:

TDLR
PO Box 12157
Austin, TX 78711-2157
Fax 512/463-1512
continuing.education@tdlr.texas.gov

After you are approved, TDLR will send you a certificate which contains your official education provider number. If you are applying to be both a provider of core courses and a provider of continuing education you will receive a provider number for each.

(In addition to your official provider certificate, you will receive a PIN number and instructions on how to implement TDLR's online credit posting program. By using it, you can ensure your students are given credit as correctly and as quickly as possible!)

You will also need to notify TDLR of the core courses you intend to offer before you proceed. TDLR will issue a certificate with a special identification number for each class you offer.

If you intend to offer continuing education, you will need to contact the Comptroller's Office/Property Tax Assistance Division at least 30 days in advance to request approval of your offering. Refer to their website for more information: <https://comptroller.texas.gov/taxes/property-tax/education/index.php>

After PTAD approves your request, they will notify TDLR. In turn, TDLR will issue a certificate with a special identification number for each continuing education offering.

Currently there is no fee to become a provider of core courses or continuing education.

Your responsibilities before the course

- Notify PTEC at least four weeks before holding class (preferably earlier) and order your class materials; use a **Notification of Course Offering and Request for Materials** form, available here: http://www.ptectexas.org/Provider_Info.html
- Use an instructor approved by PTAD
- Reach agreement for compensation and expenses with instructor
- Determine what audio-visual equipment the instructor will need
- Comply with all TDLR rules and regulations and all PTAD rules and regulations
- Use the most up to date class materials (always check with PTEC before using!)
- Prepare a sign-in sheet and grade sheet (TAAD will send samples, if you wish)
- Prepare copies of all class materials & any additional handouts provided by the instructor
- Prepare copies of PTAD's Instructor Observation and Evaluation Form for students to complete
- Provide the instructor with the Instructor Comment Form (comes with PTEC materials)

Your responsibilities after the course

- Notify each student of his/her grade
- Provide certificate of completion to students (this is now optional)
- Use TDLR's online credit posting program
- Remit PTEC licensing fee for all students, along with this information:
 - course offered;
 - instructor's name;
 - date and place the course was offered (city or county); and
 - roster/sign-in sheet
 - Instructor Comment Form
- Submit the completed Instructor Observation and Evaluation Forms to PTAD

Your responsibilities before the seminar/conference

- For continuing education, request approval for credit from PTAD. Contact them at least 30 days in advance of your scheduled offering.
- Complete the **Continuing Education Program - Approval Form** on the Comptroller's website (<https://comptroller.texas.gov/forms/50-769.pdf>). Submit the appropriate supporting documentation. If PTAD approves the program, they will forward the form to TDLR for awarding CE credit hours. TDLR will assign your program a unique identifying number.
- Reach agreement for compensation and expenses with instructor
- Determine what audio-visual equipment the instructor will need
- Comply with all TDLR rules and regulations and all PTAD rules and regulations
- Prepare copies of all class materials and any additional handouts provided by the instructor
- More questions? Check out: <https://comptroller.texas.gov/taxes/property-tax/education/courses-faqs.php>

Your responsibilities after the seminar/conference

- Provide certificate of completion to students (this is now optional)
- Use TDLR's online credit posting program

Costs payable to PTEC

- \$50 for master set of class materials (instructor guide, student outline, overheads, exam and key)
- \$20 per student licensing fee
- Make check payable to PTEC and mail, along with a copy of your roster, within 30 days after the class to PTEC; PO Box 470945; Fort Worth, Texas 76147-0945
- If payment is not timely received, PTEC will assess a \$50 penalty per course for payments received 31-60 days following end of class. If payment is not timely received by the 60th day after course ends, PTEC will assess a \$100 penalty per course.

Frequently Asked Questions (FAQ)

► *We were Secondary Sponsors when BTPE was around. What do we have to do to continue offering courses locally?*

Secondary sponsors no longer exist -- that was a rule of the now-defunct BTPE. To offer classes locally NOW, follow the directions in this guide to get registered with TDLR.

► *Which courses are "core" courses?*

- 101 – Introduction to Property Tax Administration
- 102 – Introduction to Property Tax Appraisal
- 201 – Sales Comparison Approach to Value
- 202 – Cost Approach to Value
- 203 – Appraisal of Real Property (combined 201 and 202)
- 3 – Income Approach to Value
- 4 – Business Personal Property Appraisal
- 5 – Mass Appraisal Concepts
- 7 – Property Tax Law
- 8 – Assessment and Collections
- 9 – Advanced Assessment and Collections
- 10 – Analysis of a Real Property Appraisal

- 28 – Truth in Taxation
- 30 – Ethics for Property Tax Professionals
- 31 – USPAP (refresher course, not technically a “core” course)
- 32 – USPAP

NOTE: TDLR does not refer to courses by number. They refer to them by subject matter.

► ***How do we go about securing continuing education credit for a seminar or chapter meeting we are scheduling locally?***

You will need to seek approval from the Comptroller’s PTAD for the education offering. This must be done in advance of holding the event. Information you need is on the agency’s website at:

<https://comptroller.texas.gov/taxes/property-tax/education/index.php>

► ***How long does it take to become approved as a sponsor?***

Usually it takes less than a week, especially if all information is submitted correctly.

► ***What do we charge students to attend our class?***

That's up to you. You'll need to cover the cost of instructor expenses, copying class materials, etc.

► ***What do we pay PTEC when we sponsor a course?***

You will pay \$50 for a master set of the most current course materials and a \$20 per student licensing fee. Suggestion: If you already have a set of course materials, contact PTEC before ordering a new set. They can verify whether you already have the most current course materials.

► ***Can we purchase one copy of the Texas Ad Valorem Tax Textbook (pink text) and make copies for each student?***

No. This text is no longer available.

► ***Are there property tax glossaries available?***

Yes, they are copyrighted by PTEC. They may be purchased individually through TAAD.

► ***Can we make copies of the student outlines used in PTEC courses?***

Yes. Your \$20 per student PTEC licensing fee conveys permission for you to copy these class materials for each enrolled student.

► ***How do we order required or suggested texts, such as IAAO books, for students?***

Contact IAAO directly to order these texts.

► ***In what format can we receive the overhead visual aids for the class?***

The overheads are prepared in PowerPoint format. PTEC can email them or send them on a CD.

► ***How do I find an approved instructor?***

The Comptroller's website has a list:

<https://comptroller.texas.gov/taxes/property-tax/education/approved-instructors.php>

► ***When do I need to use an approved instructor?***

You will need a PTAD-approved instructor for PTEC core courses. For CE programs, such as seminars and conferences, however, you are not required to use a PTAD-approved instructor.

▶ ***How much do we pay an instructor?***

That is negotiated between the class sponsor and the instructor.

▶ ***Do I need to provide each student with a certificate after attending class/seminar/etc?***

That is up to you. TDLR no longer requires that each student maintain a certificate for proof of attendance at the class/seminar/etc.

▶ ***If a student fails a course, may they at least get credit for auditing the course?***

If the course is taken for certification, no. For certification purposes, the student must pass the end of course exam.

▶ ***Must a student take and pass the end of course exam in order to get continuing education for a course?***

According to TDLR, a student taking a course for continuing education will receive the same credit whether or not he/she takes the end of course exam.

▶ ***What if we cancel a local course?***

Notify PTEC as soon as possible.

▶ ***What is PTEC?***

It's an acronym for the Property Tax Education Coalition - a group of seven property tax-related organizations who have informally joined together to address the needs of educating property tax professionals.

▶ ***What is the PTEC fee?***

For 2017, it's a \$20 per student "licensing" fee, paid to the coalition for use of copyrighted materials it developed and maintains.

▶ ***For which students must we pay the PTEC fee?***

You must pay the PTEC fee for all students who take a course that is the property of PTEC. It does not matter if they are or aren't registered with TDLR, or whether they are taking the course for state licensing requirements, CEs or simply taking the class for other reasons.

▶ ***Why must I send a roster to PTEC?***

PTEC requires a roster to ensure that the correct fees have been paid. If you would like to protect students' confidentiality, provide only for each their name and employer.

▶ ***Where can I find PTAD's Instructor Observation and Evaluation form for State Courses, and how do I submit the completed evaluations?***

The form is available for download from the Comptroller's website:

<https://comptroller.texas.gov/forms/50-799.pdf>. Once complete, you should scan and send them to PTPCE@cpa.texas.gov.

Current as of June 6, 2017