

Becoming a Local Sponsor of State Courses and/or Continuing Education // 2011

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 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 Registration**. 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@license.state.tx.us

If you plan to offer continuing education, file a **TDLR Property Tax Professionals Continuing Education Provider Registration**. 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
ce@license.state.tx.us

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:

<http://www.window.state.tx.us/taxinfo/proptax/education.html>

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 class/seminar/conference

- 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
- 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 copies of all class materials for each student enrolled

Your responsibilities after the class

- Notify each student of his/her grade
- Provide certificate of completion to students
- 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

Costs payable to PTEC

- \$50 for master set of class materials (instructor guide, student outline, overheads, exam and key)
- We will also send you a sign-in sheet/roster and a sample evaluation form, if you wish
- \$30 per student licensing fee
- Make check payable to **PTEC** and mail within 30 days after the class to PTEC; PO Box 130432; Houston, TX 77019-0432

Frequently asked questions (FAQ)

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

First – secondary sponsors don't exist anymore. That rule of BTPE's doesn't exist any longer. To offer classes locally NOW, follow the directions in this guide to get registered with TDLR.

► **Which courses are “core” courses?**

- 1 - Introduction to the Texas Property Tax System
- 2 - Appraisal of Real Property
- 3 - Income Approach to Value
- 4 - Business Personal Property Appraisal
- 5 - Mass Appraisal Concepts
- 7 - Property Tax Law
- 8 – Property Tax Assessment and Collections
- 9 - Advanced Property Tax Assessment and Collections
- 10 -Appraisal Analysis Course
- 30- Ethics for Property Tax Professionals
- 31-USPAP (refresher)
- 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:

<http://www.window.state.tx.us/taxinfo/proptax/education.html>

► **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 set of the most current course materials. Suggestion: If you already have a set of course materials, contact PTEC before ordering a new set. We can verify whether you may 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.

► **Can we purchase one copy of the PTEC Glossary and make copies for each student?**

No. This text is copyrighted by PTEC. It is available for purchase from PTEC, however.

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

Yes. Your \$30 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. PTEC can email them or send them on a CD.

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

The Comptroller's website has a list:

(http://www.window.state.tx.us/taxinfo/proptax/approved_instructors.html)

► **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?**

Yes. TDLR requires that each student receive a certificate for proof of attendance at the class/seminar/etc.

► **If a student fails the 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. There is no cancellation penalty.

► **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 2011, it's a \$30 per student "licensing" fee, paid to the coalition for use of copyrighted materials it developed.

► **Which students pay the PTEC fee?**

All students pay the PTEC fee when they 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, CEUs 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.

Current as of January 21, 2011