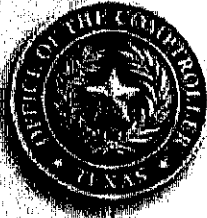




Continuing Education Programs, Educational Courses and Instructor Approval

**Texas Comptroller of Public Accounts
Property Tax Assistance Division**

Overview



- Background information
- Continuing education programs
- Educational courses
- The application process
- The approval process
- Course renewal requirements
- Withdrawal of educational course approval
- Instructor approval
- Maintaining instructor status

Background



- Occupations Code Section 1151.1015
- Tax Code Section 5.05
- Approval of courses offered by
 - The Appraisal Foundation (TAF)
 - The International Association of Assessing Officers (IAAO)
 - The Appraisal Institute

Continuing Education Programs



- Definition
- Must apply 30 days before the event
- Applying for continuing education credit hours

www.window.state.tx.us/taxinfo/taxforms/50-769.pdf

- Approved topics
- Approval is valid for one year

Educational Courses



- Definition
- Approved courses
www.window.state.tx.us/taxinfo/proptax/educational_courses.html
- Categories
- Non-eligible items and courses
- Valid for three years
- Updates

Educational Courses – The Application Process



- Course submission requirements
 - Materials
 - Agenda
 - Links
 - Activities
 - Quizzes and exams
 - Policies
- Checklist

Educational Courses – The Approval Process



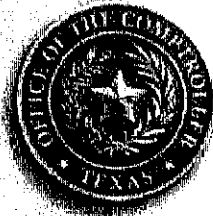
- Separate application for each delivery method
- Applicants may not mention review process
- Comptroller will
 - Approve
 - Deny
 - Ask for more information
- Approval valid for three years

Confidentiality



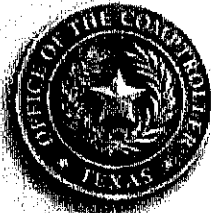
- Courses are subject to release as public information
- What if an applicant believes a portion of a course or materials is confidential?
- How does PTAD deal with confidentiality requests?

Educational Courses – Renewal Requirements



- Must be submitted 90 days before expiration
- Must submit course material that was added or changed
- Expired courses must apply as a new course

Withdrawal of Educational Course Approval



- Outdated laws, practices, theories or methodology
- False inaccurate or misleading information
- Different course
- Misrepresentation of course approval
- Proprietary rights sold

Instructor Minimum Qualifications



- Professional Designation

www.window.state.tx.us/taxinfo/proptax/instructorcriteria.htm

- One or more of the following qualifications;
 - Bachelor's degree or higher and five years experience directly related to the subject
 - Five years property tax teaching experience related to the subject
 - Seven years property tax work experience related to the subject
 - Proof of certification as an instructor by TAF, IAAO or the Appraisal Institute

Instructor Approval – The Application Process



- Application for Educational Course Instructor

www.window.state.tx.us/taxinfo/taxforms/50-788.pdf

- Resume
- Proof that one or more of the minimum qualifications is met

Currently Approved Instructors



- Previously approved by the Board of Tax Professional Examiners
- Currently approved by PTAD
- Listed here:

www.window.state.tx.us/taxinfo/proptax/approved_instructors.html

- Must apply by Sept. 30, 2011

New Instructor Qualifications



- **Trainee Instructor Status**
 - Required courses and exam
 - Assistant teaching
 - Evaluation
- **Regular Instructor**
 - Complete trainee requirements
 - Successful evaluation

Maintaining Instructor Status



- Conduct themselves with integrity
- Maintain professional designation
- Eight hours professional development
- Comply with laws, rules and standards
- Assist in training others
- Reapply every four years
- Course rewrites and updates

Instructor Evaluations



- Evaluation by students
- Negative comments
- Random audits

Contact Information



Questions?