

The seal of the Texas Comptroller of Public Accounts is visible in the background. It features a central five-pointed star surrounded by a wreath of olive and oak branches. The words "THE COMPTROLLER" are arched above the star, and "TEXAS" is arched below it.

Glenn Hegar

Texas Comptroller of Public Accounts

Guidelines for Education Approval

Property Tax Professionals

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Introduction

The Texas Comptroller of Public Accounts is required to approve continuing education programs and educational courses for property tax appraisers and tax assessor-collectors (Occupations Code Section 1151.1015).

By memorandum of understanding, the Comptroller's office approves education curricula and materials for appraisers, assessors and collectors for the Texas Department of Licensing and Regulation (TDLR) (Tax Code Section 5.04(a)). Contact TDLR for information regarding property tax professional registrant requirements at ce@tdlr.texas.gov.

Continuing education programs and educational courses that have not been approved by the Comptroller's office must be submitted for approval as outlined in these guidelines.

Pre-Approved Courses and Programs

The Comptroller's office may approve publications relating to the appraisal of property and the administration of taxes, including materials published by The Appraisal Foundation (TAF), the International Association of Assessing Officers (IAAO), or other professionally recognized organizations, for use in the administration of property taxes (Tax Code Section 5.05). Accordingly, programs and courses offered by or through TAF, IAAO and the Appraisal Institute (AI) are approved by the Comptroller's office for the amount of credit allowed by the respective organization. These programs and courses are not subject to submission for approval until further notice.

Non-Qualifying Courses and Programs

The following types of programs or courses are generally not allowed for core education or continuing education credit purposes:

- programs that do not fall within one of the allowed program topic categories;
- programs designed or intended to market a product or service;
- programs intended to solely teach non-property tax skills such as training in the use of hardware, office equipment, non-appraisal, non-assessment or non-collection software, professional development or general communication skills such as public speaking, individual money management or investing, career building, rainmaking and marketing skills or supervisory or general office management skills;
- programs directed to the general public and not targeted to property tax professionals; or
- certain program sessions such as opening or closing remarks and question and answer sessions.

Instructors

Core educational courses taken for TDLR credit can only be taught by approved instructors. Continuing education programs (including the required Uniform Standards of Professional Appraisal Practice (USPAP) and state-required laws and rules update) do not require approved instructors.

Continuing Education Program Approval

TDLR continuing education program providers may submit a request for approval of a program by submitting the Comptroller's [Form 50-769, Continuing Education Program–Approval Request](#), and supporting materials to the Comptroller's Property Tax Assistance Division (PTAD) a minimum of 30 calendar days prior to the date of the program.

A continuing education program is a workshop, forum, seminar or other presentation that lasts no more than two days. Conference programs must also follow this procedure.

PTAD will review requests and will approve, deny or ask for more information to make a determination concerning the number of hours for which credit will be given by TDLR.

Qualifying Topics

Programs must fall within one of the following eight topics to qualify for continuing education credit. Additional information regarding each of the topics below can be found in the definitions section at the end of this publication.

1. appraisal standards and methodology
2. customer service
3. ethics-general
4. ethics-chief appraiser
5. laws and rules, including implementation of new legislation
6. state-required laws and rules update
7. tax assessment and collection
8. Uniform Standards of Professional Appraisal Practices

The Comptroller's office may ask for additional information to help categorize programs for approval.

Non-Qualifying Topics

The following types of programs are generally not allowed for continuing education credit:

- programs that do not fall within one of the allowed continuing education program topics;
- programs designed or intended to market a product or service;
- programs intended to solely teach non-property tax skills such as training in the use of hardware, office equipment, non-appraisal, non-assessment or non-collection software, professional development or general communication skills such as public speaking, individual money management or investing, career building, rainmaking and marketing skills or supervisory or general office management skills;
- programs directed to the general public and not targeted to property tax professionals; or
- certain program sessions such as opening or closing remarks and question and answer sessions.

Approval Request Submission

Submit a request for approval of a continuing education program using [Form 50-769, Continuing Education Program – Approval Request \(PDF\)](#) found on PTAD website a minimum of 30 calendar days prior to the date of the program; however, PTAD, at its sole discretion may grant approval on late-submitted and retroactive requests. Supporting materials indicating program content and a timed agenda must be provided.

Supporting materials include a timed agenda and a description of each topic for which continuing education credit is requested. Conferences or other programs with concurrent sessions scheduled throughout may submit one approval request form for the event, but each session will be awarded continuing education credit as a separate program. Programs should be submitted in quarter hour increments.

Credit Awarded

The Comptroller's office approves continuing education credit on an hour-for-hour basis for programs that submit timed agendas including breaks and lunches and rounds down to the

closest quarter hour for continuing education credit. Programs with timed agendas that do not include breaks and/or lunches will be approved as 50 minutes of continuing education credit for every 60 minutes of actual class time and rounded up to the closest quarter hour for continuing education credit.

The Comptroller's office will approve, deny or ask for more information to make a determination concerning the number of continuing education credit hours which will be given to TDLR.

Provider and TDLR Notification

The Comptroller's office will notify the provider of an approved program by returning the executed approval form indicating the number of allowed continuing education credit hours. This notification is copied to TDLR for awarding of continuing education credit hours in TDLR's system.

Continuing education program approval is good for one year from the approval date. Programs are not automatically renewed and the Comptroller's office is not responsible for notifying providers of program expirations.

For information regarding the final disposition of requests for awarding continuing education credit for programs or courses, please contact TDLR at ce@tdlr.texas.gov.

Program Renewals

The same process is followed for continuing education program renewals as for first-time continuing education program approval submissions. The Comptroller's [Form 50-769, *Continuing Education Program–Approval Request*](#), should be submitted with supporting documentation a minimum of 30 days prior to the expiration of the continuing education program.

Educational Course Approval

Any school or organization, person or other entity that owns the proprietary rights to an educational course is eligible to apply for course approval.

TDLR core education providers may submit a request for approval of educational course materials by submitting the Comptroller's [Form 50-783, Educational Course Submission](#), and supporting materials to PTAD a minimum of 90 calendar days prior to the date of the course.

Educational courses include courses required for initial classification and/or certification in accordance with TDLR's classification system for property tax professional registrants and courses greater than two days in duration. Continuing education credit may be allowed for educational courses.

Applicants may not state in any advertising or other materials that a course is being or has been submitted to PTAD for review. If an applicant violates this provision, PTAD may suspend the review of the educational course in question until the violation is corrected. If the violation is not corrected within thirty (30) days of notice, then the application may be declined.

Qualifying Topics

Educational courses must fall within one of the following five topics to qualify for approval as property tax professional core education material. Educational course titles are not required to mirror major topics. Additional information regarding each of the topics below can be found in the definitions section at the end of this publication.

1. appraisal standards and methodology
2. ethics
3. laws and rules
4. tax assessment and collection
5. Uniform Standards of Professional Appraisal Practices

The material may include coverage of technical, scientific or other bodies of knowledge that are directly related to any of these subjects.

Non-Qualifying Topics

An educational course shall NOT be approved if it:

- does not fall within one of the allowed educational course topics;
- does not meet the definition of a core education course as required for certification by property tax professionals with TDLR;
- is designed or intended to market a product or service to property tax professionals;
- is intended to solely teach non-property tax skills such as training in the use of hardware, office equipment, non-appraisal, non-assessment or non-collection software, professional development or general communication skills such as public speaking, individual money management or investing, career building, rainmaking and marketing skills or supervisory or general office management skills; or
- is directed to the general public and not targeted to property tax professionals.

Approval Request Submission

Submit a request for approval of core educational course materials using [Form 50-783, Educational Course Submission](#), together with all course materials, a minimum of 90 calendar days prior to the date of the course offering; however, the Comptroller's office, at its sole discretion, may grant approval on late-submitted and retroactive requests. Separate application and approval is required for each delivery method of an educational course. Delivery methods may include classroom, online or self study.

Applications not received at least ninety (90) calendar days prior to the start of the educational course for which approval is sought may not be approved and timely submitted to TDLR.

Course materials must be submitted electronically, preferably in Microsoft Word to allow for tracking revisions. The course material submission should include:

- Application
- Instructor materials
- Course overview or description
- Timed agenda
- Learning objectives
- Course outline
- Instructor qualifications
- Course activities, examples or case studies (at least one per section or chapter)
- Student materials (if not duplicative of instructor materials)
- Course quizzes or examinations
- Reference materials
- Course ownership policies

Certain submission items may be included within other submission items. More information regarding submission items can be found in the definitions at the end of this publication.

Appendix A is a checklist for course material submission. It is not required to be included with the submission, but is a useful tool to verify submission of all materials required to obtain approval. Incomplete application submissions may be returned for further information. Course materials will not be considered submitted until all required course materials are received.

Continuing Education Credit

Continuing education units are approved for educational course work only and not for examinations.

Continuing education units are calculated on an hour-for-hour basis for submissions with a timed agenda that indicates breaks and lunches. Submissions with timed agendas that do not indicate breaks and/or lunches are calculated as 50 minutes of continuing education credit for every 60 minutes of actual class time.

Confidential Information

Educational courses submitted to PTAD for review are subject to release as public information unless the course and associated materials or specific parts of them can be shown to be exempt from the Texas Public Information Act.

All applicants are advised to consult with legal counsel regarding disclosure issues and take the appropriate precautions to safeguard trade secrets or any other proprietary information. The Comptroller's office assumes no obligation or responsibility relating to the disclosure or nondisclosure of information submitted by applicants.

If an applicant believes that any portion of a course or associated materials is confidential, then the applicant must so specify.

- The applicant must stamp in bold red letters the term **CONFIDENTIAL** on that specific part or page of the submitted materials which the applicant believes to be confidential.
- The applicant must submit in writing specific detailed reasons, including any relevant legal authority, stating why the respondent believes the material to be confidential.
- Vague and general claims as to confidentiality will not be accepted. The Comptroller's office will be the sole judge as to whether a claim is general and/or vague in nature.

All courses and associated materials and/or parts of them which are not marked as confidential will be automatically considered public information after the approval is determined. Successful applications may be considered public information even though parts are marked confidential.

In the event the Comptroller's office receives a request for portions of a course or associated materials marked confidential as specified above, the Comptroller's office:

- may forward such request to the Texas Attorney General's office for an opinion on whether such information may be withheld from disclosure under the Texas Public Information Act.
- will notify the applicant whose course and/or associated materials are the subject of the request if the information is forwarded to the Attorney General's office.
- is obligated to comply with the decision of the Attorney General, including any such decision calling for the release of information marked **confidential** by a respondent.

Copyrighted materials are not released, but are made accessible for viewing pursuant to the Public Information Act.

Approval Notification

PTAD will review requests and approve, deny or ask for more information as necessary to make a determination concerning whether the course meets the TDLR core education requirement for property tax professionals and the number of continuing education hours allowed. PTAD will send written notification of approval to the course provider and TDLR.

The educational courses listed below are required to fulfill TDLR certification requirements for property tax professional designations. Educational courses are approved in even-numbered years based on two-year or six-year cycles depending upon subject matter. **Exhibit 1** indicates the approval period for course topics. PTAD is not responsible for notifying educational course owners of course expiration dates.

EXHIBIT 1
Course Topic Approval Periods

| Two-Year Approval Course Topics |
|--|
| Ethics |
| Introduction to Property Tax Administration |
| Introduction to Property Tax Appraisal |
| Property Tax Law |
| Uniform Standards of Professional Appraisal Practice (USPAP) |

| Six-Year Approval Course Topics |
|---|
| Appraisal Analysis |
| Assessment and Collection |
| Advanced Assessment and Collection |
| Business Personal Property |
| Income Approach |
| Mass Appraisal |
| Real Property (Cost Approach and Sales Approach, combined or as separate courses) |
| Truth-in-Taxation |

A list of approved educational courses can be found on PTAD’s website. Any educational courses not already approved by PTAD or offered by or through TAF, IAAO and AI are subject to the 90-day submission and educational course approval process. If you have questions regarding approval of TAF, IAAO or AI courses as they relate to TDLR classification, please contact PTAD at PTPEdu@cpa.texas.gov.

Material Updates and Rewrites

Educational course owners are required to maintain and regularly update course content to reflect changes in law, theory and methodology and to make corrections to account for errors, such as mathematical errors, grammar or formatting.

Material Update

Material updates include nonsubstantive changes to account for errors, such as mathematical errors, grammar or minor formatting. Such nonsubstantive changes must be made to course materials, but need not be submitted to PTAD for approval.

Material Rewrite

Material rewrites include substantive changes due to changes in law theory and methodology or substantially revised by changing the layout, formatting, curriculum, activities, examples, work problems or examinations. Material rewrites include changes due to newly passed legislation or newly published editions of texts on which an educational course is based.

Material rewrites require PTAD approval. Educational course owners are required to identify and explain any revisions to educational course materials submitted to PTAD, using Microsoft Word track changes or another method that allows easy identification.

Educational course owners are required to provide a supplemental instructor guide for use until the new course materials are approved.

Renewal Requirements

Educational course owners must submit a completed [Form 50-783, Educational Course Approval Request](#), indicating the course is a renewal, together with any course material changes. Educational course owners are required to identify and explain any revisions to educational course materials.

Educational course renewals must be submitted to PTAD at least ninety (90) days prior to the course expiration date. Failure to submit all required materials could result in a request for further information and a delay in the approval process. Renewal course materials are not considered received until the complete renewal application and all required information is received.

Educational course owners are not required to submit previously-approved course materials unless substantive changes have been made and material is required to be updated or rewritten as previously defined in this policy.

Course Approval Withdrawal

PTAD retains the right to withdraw approval of any educational course upon a finding that certain conditions or circumstances exist regarding the course. They include, but may not be limited to, one or more of the following conditions or circumstances.

- Educational course material contained outdated laws, practices, theories or methodology.
- The educational course owner submitted false or misleading information during the application process.
- The educational course taught was different than that for which approval was received.
- The educational course owner misrepresented approval of a course.
- The educational course owner failed to notify PTAD that proprietary rights were sold to a new course owner.

Instructor Approval

PTAD approved courses for TDLR core education must be taught by instructors approved to teach the subject. Persons seeking approval to instruct TDLR core educational courses must submit [50-788, Application for Educational Course Instructor](#), together with supporting documentation indicating all of the professional and training requirements have been met. A core educational course taught by an individual who is not an approved instructor may not be valid for certification credit.

PTAD will review applications and will approve, deny or ask for more information as necessary to make a determination concerning application approval.

Instructor approval is based on topic. Please see the list of approved educational course instructors indicating topics allowed for each approved instructor on the Comptroller's website.

Minimum Professional Qualifications

Applicants seeking to serve as an instructor for core educational courses for property tax professionals seeking certification with TDLR must hold one of the required professional credentials and satisfy the professional experience requirements.

Professional Credentials

An instructor applicant must have achieved one of the following professional designations or be an employee of a law firm who reports to a licensed attorney and is specifically involved with instruction and education for property tax professionals.

- Registered Professional Appraiser (RPA)
- Registered Texas Assessor-Collector (RTA)
- Registered Texas Collector (RTC)
- Members of the Appraisal Institute (MAI)
- Senior Residential Appraiser (SRA)
- Senior Real Property Appraiser (SRPA)

- Assessment Administration Specialist (AAS)
- Certified Assessment Evaluator (CAE)
- Cadastral Mapping Specialist (CMS)
- Personal Property Specialist (PPS)
- Residential Evaluation Specialist (RES)
- Certified General Real Estate Appraiser
- Certified Residential Real Estate Appraiser
- State Licensed Real Estate Appraiser
- Doctor of Jurisprudence (JD)

Only a person with a Doctor of Jurisprudence degree may teach a property tax law course. A qualified applicant has attained a Doctor of Jurisprudence; has 5 years of experience practicing property tax law as a licensed attorney; and is currently involved in the practice or administration of property tax law. Applicants meeting these qualifications are exempt from the training instructor requirements.

Instructors who are retired attorneys are eligible to retain approved instructor status, but must complete the required eight hours of professional development every four years and take a state-required laws and rules update for each legislative session. Instructors will be permitted to teach courses pending completion of these requirements.

Instructors who achieved RPA, RTA or RTC designations, but are no longer designated due to employment changes are eligible to retain approved instructor status. In order to maintain instructor status, the instructor must complete the required eight hours of instructor professional development and maintain the same level of continuing education required by TDLR for designees. Instructors will be permitted to teach courses pending completion of these requirements.

Professional Experience

An applicant must satisfy **one or more** of the following four education and experience requirements.

1. A bachelor's degree or higher degree in any field and five years of experience directly related to the subject matter to be taught.
2. Five years of experience teaching property tax appraisal, assessment or collection courses that meet at least one of the following criteria (distance education cannot be used as teaching experience):
 - Approved by Board of Tax Professional Examiners (BTPE) and preapproved by PTAD; approved by PTAD on or after Jan. 1, 2011; or a combination of the two for a total of five years of experience;
 - Approved by the Appraisal Institute, The Appraisal Foundation or International Association of Assessing Officers; or
 - Taught through an accredited college or university.
3. Seven years of property tax appraisal, assessment or collection work experience related to the subject matter to be taught.

[One year of property tax appraisal, assessment or collection experience. A year of experience for this qualification is defined as a calendar year in which the individual spent more than 50 percent of his or her professional time appraising, assessing or collecting taxes on real property, personal property or business property for an appraisal district or tax office and derived a significant portion of his or her income from performing these duties.]
4. Certification as an instructor by The Appraisal Foundation, International Association of Assessing Officers or the Appraisal Institute.

Instructor Training Requirements

Applicants must meet the following instructor training requirements in addition to the minimum qualifications described above.

1. **An applicant must successfully complete an instructor training course.**
 - Proof must be provided to PTAD.
 - The instructor training course requirement is waived for currently approved instructors applying to teach a course not previously taught.

2. **An applicant must have taught the course in the prior four years or taken a course on the subject matter to be taught, as well as pass the examination for that course, within the prior five years.**
 - Proof must be provided to PTAD.
 - Prior year periods are from date of application.
 - The course and examination must be completed and passed before the 25 percent co-teaching requirement.
 - Acceptance of equivalent courses to meet instructor requirements is at the discretion of the PTAD Director.
3. **An applicant must teach his or her first course with an approved instructor and teach approximately 25 percent of the course, excluding the last 25 percent of the course.**
 - The trainee must attend the entire course.
 - PTAD will not reimburse expenses for travel or course registration associated with meeting this requirement.
 - The instructor will evaluate the applicant on his or her performance during the training assignment, provide feedback for the trainee on PTAD's [Form 50-798, Trainee Instructor Feedback Form](#), and submit the form to PTAD.

Application Submission

Submit an application for instructor approval using [Form 50-788, Application for Educational Course Instructor](#), together with the following supporting documentation:

- Resume indicating experience
- Proof of degree, if appropriate
- Proof of teaching or taking the course in the specified time frame
- Proof of attending an instructor training program
- [Form 50-798, Trainee Instructor Feedback Form](#)

Applicants have one year from the date of application to furnish documentation indicating completion of all requirements. If proof of meeting these requirements is not received within one year of application date, the application will be closed. Applicants are eligible to submit new applications in the future if approval is still sought.

Applicant Notification

PTAD will send approved applicants notification of approval and certificates to teach for each approved course topic. A list of approved instructors can be found on PTAD's website.

Instructor approval is valid for four years.

Additional Course Approval

An approved instructor may apply to teach a course within his or her professional license or designation which the instructor has not taught in the prior four-year period or taken and passed the examination in the prior five-year period if the instructor:

- demonstrates mastery of instruction by receiving an overall score of 90 percent or better from student evaluations;
- demonstrates mastery of subject content by passing the examination for the course in which they are applying to teach with an overall score of 90 percent or better, procured by an approved instructor; and
- is currently an approved instructor and was an approved instructor for the prior four-year period.

An approved instructor may apply to teach a course outside of his or her professional license or designation by taking the course, passing the examination, and sending the course certificate to PTAD by email requesting to add the course.

- Instructor training is only required to be taken one time and is not required for approval to instruct additional courses.
- Instructors are not required to co-teach 25 percent of a course with an approved instructor, unless the instructor is applying to teach a course outside of his or her professional license or designation (e.g., a person with an RPA designation who wants to teach a tax collection course).
- All courses for an instructor are assigned the same renewal date regardless of when they are added as approved topics.

Maintaining Instructor Status

Instructors must comply with any and all property tax-related statutes, laws, opinions and administrative rules, including the Tax Code, Administrative Code, Occupations Code, Local Government Code, Government Code, Penal Code, Comptroller rules and TDLR rules (specifically Texas Administrative Code Section 94.100, Code of Ethics) or other applicable professional ethics policies or standards for licensure or designation.

Regular instructors are required to assist in training and evaluating instructor applicants. This includes allowing an applicant to teach 25 percent of a course the approved instructor is teaching, providing feedback for the trainee instructor on PTAD's [Form 50-798, Trainee Instructor Feedback Form \(PDF\)](#) and submitting the form to PTAD.

Continuing education credit determinations for instructing courses must be made by TDLR.

Conduct

During teaching assignments and related activities, instructors must conduct themselves with integrity. They should maintain an appropriate professional relationship with students, both in and outside of the classroom. Harassment or other discriminatory behavior directed toward any person is expressly prohibited. Instructors are obligated to refrain from such behavior and are required to discourage others from such behavior occurring in the classroom.

Professional Designation

Instructors must maintain their professional licenses or designations and attain the continuing education required by the TDLR. If an instructor fails to maintain his or her professional license or designation, instructor approval expires at the time that the license or designation expires.

Instructors who no longer have a professional designation due to employment changes are eligible to reapply at their four-year expiration date, but are required to first take

- eight hours of instructor professional development;
- a Texas property tax laws and rules update course; and
- two hours of ethics.

Instructors must maintain the same level of continuing education required by TDLR for designees.

Professional Development

To be eligible for renewal, instructors must complete eight hours of professional development during each four-year approval period. Professional development is instructor continuing education falling within one of four categories:

1. presentations and public speaking;
2. instruction technology;
3. development of courses, curricula, and teaching styles; and
4. how to teach people with different learning styles.

Instructors must take at least two hours of professional development in each category. Additional hours earned in any category may not be carried over to the next approval period.

Evaluations and Feedback

All instructors are evaluated by students through surveys at the end of each course taught. A compilation of the feedback is sent to the instructor. Educational course sponsors are responsible for returning the completed [Form 50-799, Instructor Observation and Evaluation Forms \(PDF\)](#) to PTAD. In the absence of a sponsor, the instructor is responsible for returning the forms. PTAD will use information from student evaluations to determine instructor approval during the re-approval process. Instructors must also receive a 70 percent overall positive student response from student evaluations.

Any negative survey comments or complaints will be separately evaluated and addressed with the instructor if determined to have any merit. Complaint evaluations may include requests for written or oral responses to complainants, telephone interviews with complainant and/or other course participants, class audits and instructor responses. PTAD may seek industry comment toward final resolutions.

PTAD will randomly select instructors and/or classes to audit instructor performance at its discretion.

Reapplication

Instructor approval is valid for four years. At which time, instructors are required to submit [Form 50-800, Reapplication for Educational Course Instructor](#), indicating the courses which they desire to continue to teach and the dates taught within the prior four-year approval period together with supporting documentation.

An instructor applying for continued approval as an educational course instructor for property tax professionals must satisfy the following criteria.

- The instructor must hold a qualifying professional license or designation in good standing.
- All continuing education requirements for the professional license or designation must have been met.
- The requested course topic must have been taught in the previous four-year period.
- The instructor must have watched Comptroller's video, [Educational Course Instructor Responsibilities](#), within 90 days of reapplication submission.
- The required professional development must have been taken in the previous four-year approval period.
- The instructor must have received an overall score of 70 percent or better from student evaluations.

Approval automatically expires for topics not taught within the prior four-year approval period. Instructors may, however, take the course, pass the exam, and submit the certificate requesting that the topic be added for approval.

PTAD uses evaluations received for instructors during the expiring approval period to verify courses taught.

Certification Examinations

The Comptroller's office is required to approve content of certification examinations for property tax professionals (Occupations Code Section 1151.1015). Accordingly, the Comptroller's office has approved the following examinations administered by TDLR:

- Appraiser Level III;
- Registered Professional Appraiser (RPA);
- Registered Texas Assessor-Collector (RTA); and
- Registered Texas Collector (RTC).

For more information about examinations, please contact TDLR at ce@tdlr.texas.gov.

Definitions

Appraisal standards and methodology—the appraisal standards and methodology category might include programs related to property appraisal, IAAO standards, the Comptroller’s Property Value Study, the Comptroller’s Methods and Assistance Program, ratio studies, protest and appeals or arbitration.

Continuing education credit—refers to hours awarded to educational courses that are creditable toward renewal of TDLR certification.

Continuing education program – refers to short-term workshops, forums, seminars or other presentations that last no more than two days and are taken for continuing education credit. Continuing education programs are not a regular requirement for TDLR certification purposes. Conference programs are considered continuing education programs even if more than two days in duration.

Course activities, examples or case studies—course specific materials used to demonstrate learning objectives.

Course outline—an outline of the course materials.

Course overview or description—a clear description of the content of the course.

Course ownership policies—policies indicating proprietary ownership of an educational course or sponsorship rights granted from the proprietary owner.

Course quizzes or examinations—clearly written quizzes or examinations intended to test student knowledge on course materials, together with quiz or examination keys.

Customer service—Customer service programs are defined as programs designed to enhance services to and improve relationships with the public. This typically does not include professional development or internal communication among staff members, but would include communication development with customers.

Educational course—refers to courses required for initial classification and/or certification in accordance with TDLR’s classification system for property tax professional registrants and courses greater than two days in duration for which continuing education credit may be obtained.

Educational course approval period—educational courses are approved for four years from the date of approval by PTAD.

Educational course owner—refers to any school, organization, person or other entity that owns the proprietary rights to a course. Educational course owners may have developed their own materials or may have purchased the proprietary rights to course materials. Educational course owners are responsible for the actions of any secondary providers which use PTAD approved educational material.

Ethics-general—General ethics programs include any programs related to ethics generally, including, but not limited to those pertaining to TDLR rules.

Ethics-chief appraiser—Chief appraiser ethics programs are specific to programs that include the importance of maintaining the independence of an appraisal office from political pressure.

Instructor materials—any materials for an instructor that students do not receive, including but not limited to, specific learning activities for students (at least one per section) and references and cross-references to examples and workbook questions at the appropriate place in the outline with discussion of the answers, presentation slides and keys for grading examinations.

Instructor training—is a course or program designed to teach someone how to provide instruction.

Instructor professional development—continuing education falling within one of four categories: (1) presentations and public speaking; (2) instruction technology; (3) development of courses, curricula, and teaching styles; and (4) how to teach people with different learning styles.

Instructor qualifications—a list of minimum qualifications for someone to teach the course.

Laws and rules—Laws and rules programs may deal with any statutory laws, administrative agency rules or general legislative updates.

Learning objectives—the specific, measurable, attainable and relevant knowledge or skills students are expected to acquire by completing the course.

Material update—when material has been changed or modernized to reflect more current procedures or value estimates or corrected to account for errors, such as mathematical errors, grammar or formatting. Materials containing new activities, examples, work problems or other substantial changes are considered rewrites.

Material rewrite—when material has been substantially changed due to changes in law, standards or methodology and when materials have been substantially revised by changing the layout or curriculum or by adding activities, examples and work problems. Material rewrites include changes due to newly passed legislation or newly published editions of texts on which an educational course is based.

Non-substantive revisions – revisions to materials to correct errors, such as mathematical errors, grammar or formatting. Significant formatting or course design changes may constitute substantive revision.

Presentation ready—final educational course version that is free of substantive errors.

Reference materials—copies of or electronic links to statutes, laws, rules or standards being taught.

Sponsor—a school, organization, person or other entity that purchases the rights to (but not proprietary rights) or otherwise lawfully acquires PTAD-approved material from an

educational course owner. The sponsor may independently conduct a course using such acquired educational course materials subject to these policies and procedures.

State-required laws and rules update—The state-required laws and rules update is based on legislation passed every two years; is a specific requirement for TDLR certification renewal; and has specific continuing education approval requirements. It does not include general legislative updates, which qualify under the laws and rules category. The requirements for the state-required laws and rules update program are determined biennially by the Comptroller’s office and TDLR at the end of each Texas legislative session.

Substantive errors—may include, but are not limited to: incorrect definitions, poorly worded explanations, references, techniques and/or application of techniques or any error which impacts the learning objectives of the educational course. An educational course may be considered to have substantive errors if it contains a series of errors which might not be considered significant individually, but in the aggregate affects the overall quality of the educational course material. Substantive errors result in an educational course not being presentation ready.

Substantive revisions – revisions to correct any error that impacts the learning objectives of the course or the overall quality of the educational course materials; to reflect changes in law, standards or methodology; to reflect newly published information in underlying resource materials; to change the curriculum or add activities, examples and work problems; or to make significant changes to the layout, format or design of course materials.

Tax assessment and collection—the tax assessment and collection category might include programs related to truth-in-taxation, assessment office functions, tax bills or tax collection functions.

Timed agenda—an outline that indicates the recommended time spent on each course objective, activity or examination.

Uniform Standards of Professional Appraisal Practice—USPAP programs include programs specifically covering USPAP and its applicability to property tax appraisal.

Appendix A

Checklist for Submission of Educational Course Materials

| Activity | Check When Complete |
|--|---------------------|
| <p>Course is presentation ready. Course must be ready for presentation when submitted for approval. Notes, drafts and research pertaining to a course will not be accepted in lieu of presentation and materials, but can be submitted as additional materials.</p> | |
| <p>Course is submitted in electronic format. This submission method is required.</p> | |
| <p>Request includes method of course delivery and proposed delivery dates. Methods of delivery include classroom, online or self-study.</p> | |
| <p>Request includes number of continuing education credit hours and for which category sought. The number of continuing education credit hours sought might be different than the actual course hours.</p> | |
| <p>Request is submitted with full materials, not just an overview. The following materials represent minimum submission requirements:</p> | |
| <ul style="list-style-type: none"> • entire presentation-ready course | |
| <ul style="list-style-type: none"> • timed agenda | |
| <ul style="list-style-type: none"> • learning objectives | |
| <ul style="list-style-type: none"> • course overview or description | |
| <ul style="list-style-type: none"> • course outline | |
| <ul style="list-style-type: none"> • course review | |
| <ul style="list-style-type: none"> • copies of or electronic links to statutes, laws, rules or standards being taught | |
| <ul style="list-style-type: none"> • course activities, examples or case studies | |
| <ul style="list-style-type: none"> • course quizzes and examinations | |
| <ul style="list-style-type: none"> • instructor qualifications | |
| <ul style="list-style-type: none"> • instructor materials | |
| <ul style="list-style-type: none"> • course ownership policies | |
| <p>Requestor name and contact information. Requestor's name and contact information must be provided for questions, requests or additional information and determination of approval process.</p> | |

For more information, visit our website:
comptroller.texas.gov/taxes/property-tax

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