



2017 TCI USER CONFERENCE  
CONFERENCE CURRICULUM



# Contents

Looking for more information related to the sessions available at the [2017 TCI User Conference](#)? This document provides details for each session, including the planned content and objectives as well as the variety of dates and times each session is available.

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**Note:** Sessions with \* indicate a hands-on session and content.

# Conference Agenda

Whether you want to improve your technology skills, learn and network with your peers, or keep up with the latest industry trends, be sure to join us August 22-23, 2017 at The Cosmopolitan of Las Vegas for an experience you cannot get from a standard training session.

## Personalize Your Training Experience

Learn the core system or master advanced software features to make you more efficient and help you achieve more of your professional goals.

## Connect with Your Peers and Share Best Practices

Participate in roundtable discussions, make new connections at events, or simply learn a better way to do something from other attendees.

## Receive One-on-One Attention

Connect face-to-face with TCI's professional services team in the Workshop to troubleshoot nagging issues, learn how to implement advanced features, or refine your internal processes to maximize your efficiency.

## Master Compliance and Tax Strategies

Attend our compliance- and tax-specific sessions and benefit from the valuable insight of our consulting partners.

## Earn CPE Credits

Receive valuable CPE credits for attending many [2017 TCI User Conference](#) sessions. Refer to the CPE Information located on the [conference website FAQs page](#).

**Note:** CPE credit will be issued based on the attendee's total attendance with certificates issued by session.



# Registration Information & Fee Schedule

To register for the 2017 TCI User Conference, visit [tcusercontent.com](http://tcusercontent.com).

## What the Fee Covers

### 2-Day Registration—\$1,195

- Attendance at PTMS and LicenseHQ conference sessions and workshops on Tuesday and Wednesday
- Attendance at conference events
- CPE credit for sessions attended
- Access to conference materials
- Continental breakfast, lunch, and daily beverage/snack breaks on Tuesday and Wednesday

## Group Rate

Companies sending three or more attendees to the 2017 TCI User Conference will receive a special group rate for each attendee they send (\$1,095 for 2-Day Registration). Please contact [traininginfo@taxcomp.com](mailto:traininginfo@taxcomp.com) to receive this discount.

## Cancellation Policy

A full refund, less a \$250 registration fee per registrant, will be issued provided the cancellation notice is received by Friday, August 11, 2017. Cancellations received after August 11, 2017 and no-shows will be charged the full User Conference fee. Cancellation notices must be sent via email to [traininginfo@taxcomp.com](mailto:traininginfo@taxcomp.com).



# Workshop Overview

Have specific questions related to your business? Wish to see a product demo to explore additional process improvements? Want to network with other clients and TCI staff?

If these are your goals for attending the 2017 TCI User Conference, then you'll want to plan to visit the Workshop. The Workshop is your go-to destination for new information. It's where questions get answered, possibilities are explored, and ideas happen.

## How Does It Work?

At the Workshop, we match your business issue with subject matter experts so you get the answers you need. Simply register at the welcome desk, briefly share the reason for your visit, and we'll set you up with a TCI representative for a personal discussion. You may experience a short wait due to the venue's popularity, so help yourself to complimentary refreshments and relax in our lounge.

## Workshop Product Overviews

The Workshop presents a great opportunity to see demonstrations of our single-system tax solutions, both pre-scheduled and on demand. We will showcase business process automation solutions that can help you minimize risk, reduce errors, and finish your work quickly.

# AppealTrack Sessions

Are you still using spreadsheets, email, and paper files to track tax appeals? AppealTrack helps you manage appeal protests in one system. Say good-bye to out-of-control excel spreadsheets and hello to fewer headaches, more efficiency, and increased profit. This year, we are offering two sessions on our newest product, AppealTrack.

## TAX-205 Appeals Made Simple: AppealTrack Overview

Managing appeals in our newest product, AppealTrack, allows you to manage real property appeals, centralize appeal documentation, minimize tax liability, maximize tax savings, track negotiations with jurisdictions, pay tax bills, issue check requests, and invoice customers, all within a completely web-based platform designed for use by both consultant and corporate users alike. Join this overview session and see everything AppealTrack can do!

**Track:** PTMS - Tax

**Session ID:** TAX-205

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Create and update company profiles, property records, and parcel information
- Manage appeals and generate appeal forms
- Use batch features to quickly update records
- Create custom merge documents
- Manage deadlines
- Attach electronic documents
- Generate customer invoices
- Process tax bills and issue check requests
- Discover standard reports and how to build a custom report
- Manage the Events Calendar and Outlook integration workflow
- Create client dashboards

### Day & Time:

Tuesday 3:15 p.m. – 4:45 p.m.

## TAX-206\* Appeals Made Simple: Hands-On with AppealTrack **NEW**

Centralize. Systemize. Organize. Managing appeals in our newest product, AppealTrack, allows you to manage real property appeals, centralize appeal documentation, minimize tax liability, maximize tax savings, track negotiations with jurisdictions, and invoice customers, all within a completely web-based platform. Join this hands-on session and see everything AppealTrack can do!

**Track:** PTMS - Tax

**Session ID:** TAX-206\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Create and update client profiles, property records, and parcel information
- Generate appeal forms
- Attach electronic documents and communications
- Generate customer invoices
- Manage all appeal filing and case deadlines to ensure none are missed
- Utilize batch functionality to quickly update records
- Discover standard reports and how to build a custom report
- Create custom merge letters
- Manage the Events Calendar and Outlook integration workflow

### Day & Time:

Wednesday 10:45 a.m. – 12:00 p.m.



# LicenseHQ Sessions

Minimize your time, expense, and incidents of non-compliance with LicenseHQ. Learn more about the functionality in the software for more efficient data processing, gain ideas and perspectives from industry experts, and share best practices with your peers. This year, we are offering many new sessions for managing your compliance, streamlining processes, and minimizing expenses.

You can find all of the LicenseHQ-related sessions in the following tracks:

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**Note:** Sessions with \* indicate a hands-on session and content.

## LicenseHQ Case Study (CS) Track

### CS-105 LicenseHQ and People: Records for Individuals **NEW**

Are you tasked with maintaining the records for your company's employees? Learn from the experiences of your fellow LicenseHQ users at Stanley Security Solutions, Inc., and discover how they are making use of the software to be more efficient and to provide timely reporting of what's going on with their employees.

**Track:** LicenseHQ - Case Study

**Session ID:** CS-105

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Discover how companies are managing their licensed professionals and keeping current with certification, training, and document requirements
- Make use of LicenseHQ for more than just managing your business licenses
- Explore the options of using other modules together and running reports with the cross-module reports

#### Day & Time:

- Tuesday 10:30 a.m. – 12:00 p.m.

### CS-204 Utilities and You: A Winning Combination for LicenseHQ **NEW**

Do you feel overwhelmed with the amount of work on your plate? Would you like to learn about tools that can greatly reduce the amount of time you spend manually processing data into and out of LicenseHQ? This session will provide information about the tools and utilities that can help increase efficiency for your business. Kevin Schemm from The Kroger Company will share his experiences and benefits using utilities within LicenseHQ.

**Track:** LicenseHQ – Case Study

**Session ID:** CS-204

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** LHQ-101\* or equivalent experience

**Advanced Preparation:** None

#### Session Objectives:

- Discover the available standard LicenseHQ utilities
- Learn how to install and set up utilities
- Learn how to use standard utilities
- Explore common use cases for the utilities
- Explore client case studies, including Kevin Schemm from The Kroger Company

#### Day & Time:

- Wednesday 10:45 a.m. – 12:00 p.m.



## CS-205 Beyond the Renewal: Using LicenseHQ to Manage Additional Compliance Processes **NEW**

Do you wear many hats in your position, balancing job duties beyond just license renewals? Learn how you can manage the data and processes for additional job duties in LicenseHQ. In this session, we will show you how LicenseHQ users from Accounting, Legal, Tax, and Facility departments are managing more than just licenses in LicenseHQ. Terri Pollino from Giant Eagle, Inc. will also discuss their experiences and how they fully utilize LicenseHQ.

**Track:** LicenseHQ – Case Study

**Session ID:** CS-205

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** LHQ-101\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Make use of LicenseHQ for more than just managing your business licenses
- Discover what additional job duties are common for typical LicenseHQ users
- Learn what additional modules LicenseHQ offers (Inspections, Vehicles, Contracts, Individuals)
- Explore how you can use each module to address additional job duties
- Obtain instruction on how to start using LicenseHQ for these processes

### Day & Time:

- Wednesday 2:45 p.m. – 4:00 p.m.

## LicenseHQ Data Management (LHQ) Track

### LHQ-001 Best of LicenseHQ: Tips, Tricks and Efficiency **NEW**

Have you seen fields or links in LicenseHQ that you are not using and wondered if they could benefit you? In this session, we will cover how you can fully use all aspects of LicenseHQ and integrate current external tasks into the software. We'll also show you our top LicenseHQ tips and tricks.

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-001

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Use additional fields to increase efficiency
- Identify workflow tracking methods
- Create grid views to save time reviewing records
- Discuss the top three tips and tricks

#### Day & Time:

- Wednesday 10:45 a.m. – 12:00 p.m.

### LHQ-101\* Master the Workflow: LicenseHQ Payments and Renewals

Do you want to master the LicenseHQ Renewal and Payment workflow from start to finish? This session will provide you with the tools to become an expert on the renewal and payment workflow, as well as the ability to avoid common mistakes through simple best practices.

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-101\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Configure payment and renewal options
- Review the Dashboard and common LicenseHQ workflows
- Renew and process payments for both individual licenses and a batch of licenses
- Create AP exports
- Avoid common risks and traps in the renewal and payment process

#### Day & Time:

- Tuesday 10:30 a.m. – 12:00 p.m.

## LHQ-102\* LicenseHQ Forms for Your Information

Have you seen our new, easier-to-use Forms functionality? Come by and explore all of the exciting enhancements we added to make searching for forms and creating new licenses more efficient for our users.

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-102\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Discover the four new ways to search for forms
- Create multiple licenses tied to the same form but for different sites in one batch process
- Identify newly saved searches
- Make use of in-grid filtering

### Day & Time:

- Wednesday 9:15 a.m. – 10:30 a.m.

## LHQ-103\* Using LicenseHQ to Inform, Notify, and Sync with the Rest of Your Business **NEW**

Do you want to learn how to quickly set up notifications and reports to gain insight into your daily licensing compliance? This hands-on session will help you identify the best ways for you and your company to stay “in the know” about your compliance obligations through LicenseHQ notifications and reports.

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-103\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Learn about custom LicenseHQ reports
- Configure “cross-module” reports
- Work with the new custom Task report
- Learn how to use LicenseHQ export functionality
- Create and save export configurations
- Send custom reports to anyone, including external email addresses that do not belong to a LicenseHQ user
- Generate site reports that communicate upcoming renewals, expected licenses, and received licenses
- Customize notifications based on Task-specifics and defined approval limits
- Email custom reports
- Create and use email distribution groups
- Manage the timing of all scheduled reports

### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## LHQ-104 Stated Specifically: Tips for Using LicenseHQ in Certain Jurisdictions **NEW**

Do some authorities make you want to pull your hair out in frustration? In this session, we will take a closer look at the jurisdictions that cause some of the biggest licensing challenges. Learn best practices for dealing with states that base licensing requirements on the point of sale or service and how it affects companies with ecommerce, service technicians, and others. We will also take a closer look at how to best prepare for agencies that require complex and cumbersome data collection, signatures, and paperwork for their applications and renewals.

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-104

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Learn how to manage licensing when there is no site (store)
- Learn how to standardize imports of sales, employee records, and other data needed for renewals
- Learn best practices and network with peers
- Explore which states cause the biggest challenges and why

### Day & Time:

- Wednesday 9:15 a.m. – 10:30 a.m.

## LHQ-201\* A Quicker LicenseHQ: Imports, Tasks, and Batch Operations **NEW**

LicenseHQ provides many tools to streamline your compliance processes. Together we will analyze how imports, tasks, and batch updates can help eliminate time-intensive manual procedures. Come and discover methods to efficiently manage your renewals, payments, and store openings. Join this session to learn how LicenseHQ can create a successful environment where missed deadlines are a thing of the past.

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-201\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** LHQ-101\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Review the import process and learn how to quickly update a batch of data
- Uncover additional methods for selecting and updating multiple records
- Analyze license workflow through exploration of Dashboard task lists and associated batch processing
- Discover tips for staying on target through the creation and management of tasks

### Day & Time:

- Tuesday 1:30 p.m. – 3:00 p.m.

## LHQ-203\* Leave Your Troubles Behind: Solving Problems in LicenseHQ **NEW**

Have you ever had trouble figuring out why a license isn't renewable in LicenseHQ? Couldn't approve a check request? Felt like records disappeared and you weren't sure how to get them back? Thought payments should be ready for check requests but they weren't? This session will help familiarize you with common and uncommon problems and how to solve them!

**Track:** LicenseHQ - Data Management

**Session ID:** LHQ-203\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** LHQ-101\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Use workflow status tracking to determine why licenses are not in renewal status
- Develop the best method of displaying the Dashboard using dates and customization
- Test for filter criteria to display check requests by state
- Select organization appropriate setup options
- Change data on payment records to allow check request creation
- Construct a process to remove incorrect payment information and re-enter payments
- Decide the best practice for updating records for filtering, reports, and exports
- Outline grid configurations to identify data issues

### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.

## SME-001 Expert Panel: Current Licensing Trends and Issues **NEW**

Knowledge is power. Hear from industry experts to learn ways to get the most out of your software investment and work more efficiently. This session offers idea sharing through discussions, client solutions, and tips and tricks that you can put into practice as soon as you return to the office. Business License professionals from both Clark County and the City of Las Vegas will be sharing tips for your success!

**Track:** LicenseHQ - Data Management

**Session ID:** SME-001

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Gain insight from industry experts that have found solutions to issues you are currently facing
- Discover time-saving solutions that will reduce processing times and make your life easier
- Explore a whole new world of tips and tricks that will help drive efficiency throughout your tax processes

### Day & Time:

- Tuesday 8:45 a.m. – 10:15 a.m.

## LicenseHQ General Session (GS) Track

### GS-001 Opening Bid: User Conference Kick-Off

Kick off the conference, find out what's new, and see where we're headed at this opening session. You'll also learn important details about conference activities and events, so don't miss it.

**Track:** All - General Session

**Session ID:** GS-001

**Duration:** 30 min

**CPE Credit:** 0

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

**Day & Time:**

- Tuesday 8:00 a.m. – 8:30 a.m.

### GS-002 Closing the Deal: User Conference Final Session

This year's Conference Final Session will be both informative and fun, so don't miss out. The session will also include prize drawings and wrap up the team competition.

**Track:** All - General Session

**Session ID:** GS-002

**Duration:** 1 hr

**CPE Credit:** 0

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

**Day & Time:**

- Wednesday 4:00 p.m. – 5:00 p.m.

## LicenseHQ Elective (ELE) Track

### ELE-001 Skills Boost: Effective Communication for Compliance Professionals **NEW**

Ever feel like you are not communicating effectively with others? Would you like to improve your communication skills? This professional development session will focus on boosting your skills as a communicator by exploring the history and theories of communication, establishing a foundation for effective communication, and showing you how to better communicate in real world scenarios.

**Track:** All - Professional Development

**Session ID:** ELE-001

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Learn about the history and theories of communication
- Obtain a working knowledge of effective communication foundations
- Feel more confident when communicating with others

#### Day & Time:

- Tuesday 1:30 p.m. – 3:00 p.m.

### ELE-002 Skills Boost: Negotiation Skills for Compliance Professionals **NEW**

Negotiation is a key skill for success in business and life. You can become a better negotiator by following some very simple rules. This professional development session will focus on boosting your negotiation skills by exploring the theories of negotiation, explaining the techniques of negotiation, and showing you how to be more calculated about your role in negotiations.

**Track:** All - Professional Development

**Session ID:** ELE-002

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Learn about negotiation theories
- Obtain a working knowledge of negotiation techniques
- Feel more confident when negotiating with others

#### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.

## ELE-101\* Excel and the Basics

Optimize your productivity with PTMS and LicenseHQ through the use of Microsoft Excel. In this session designed for beginners, you will discover useful attributes of this powerful tool – from simple time-saving tricks to more robust features. Discover how Microsoft Excel can help you be more efficient in completing your daily tasks.

**Track:** All - Data Management

**Session ID:** ELE-101\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Review common Microsoft Excel terminology
- Identify navigation efficiencies through the use of tabs, menus, and ribbons
- Employ tools for formatting and performing calculations
- Utilize methods for easily creating charts and graphs
- Relate common data conversion issues
- Apply Excel functionality to manage data for use with TCI products

### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## ELE-201\* Excel Beyond the Basics

Optimize your productivity with PTMS and LicenseHQ through the use of Microsoft Excel. This session will cover handy practical Excel features such as vlookups, macros, functions, and arrays. In this hands-on class we will walk through the how and why of each utility, and work on examples of each.

**Track:** All - Data Management

**Session ID:** ELE-201\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** ELE-101\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Analyze functions and apply them to your own work
- Compose macros to be used again and again
- Construct vlookups to assist in troubleshooting matching records
- Define arrays and explain their usefulness in your data

### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.



## **ELE-202\* Excel Like No Other (Pivot Tables)**

You have a spreadsheet, it has thousands of records, you need to sum everything up with just a few fields – and then you need a graph of the information. What you really need is a Pivot Table! Come to this session to transform your data into information that is useful and meaningful to you.

**Track:** All - Data Management

**Session ID:** ELE-202\*

**Duration:** Tue: 1 hr 30 min; Wed: 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** ELE-101\* or equivalent experience

**Advanced Preparation:** None

### **Session Objectives:**

- Create a pivot table from an Excel spreadsheet
- Generate a graphical representation of data
- Update and modify your pivot table based on changes to the original spreadsheet

### **Day & Time:**

- Tuesday 1:30 p.m. – 3:00 p.m.
- Wednesday 2:45 p.m. – 4:00 p.m.

# PTMS Sessions

No matter what industry you are in, PTMS will reduce both your workload and your taxes. Learn the core system or master advanced software features to make you more efficient and allow you to achieve more of your professional goals. This year, we are offering many new sessions for connecting with your peers, sharing best practices, and mastering your tax saving strategies.

You can find all of the PTMS related sessions in the following tracks:

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**Note:** Sessions with \* indicate a hands-on session and content.

## PTMS Case Study (CS) Track

### CS-101\* Moving into a New Year with PTMS

It is the dawn of a new reporting year. You are eager to move forward with the wisdom and experience of the prior year, without repeating its mistakes. This session will give you the skills you need to bring your data and property records into the next year and handle asset movements, while minimizing the need to recreate data customizations from the previous year. Richard Rose from Fidelity Investments will be sharing his tips for success on preparing for the new year.

**Track:** PTMS - Case Study

**Session ID:** CS-101\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

#### Session Objectives:

- Create a new year in PTMS in the fastest way possible
- Carry over prior-year data into the newly created year
- Evaluate strategies for populating the newly created year with prior-year property data or records
- Use PTMS to identify movements, inactive property, sites, and accounts
- Clear accounts for moved assets and update new assets with data from their sites
- Employ PTMS to populate the Best Known Value for property records in prior and current years
- Distinguish how inactive property and asset movements impact returns

#### Day & Time:

- Wednesday 10:45 a.m. – 12:00 p.m.

### CS-102\* Adding Value to PTMS: Doing More with Assessed Values **NEW**

Did you ever wonder why PTMS has all those Value fields and what to do with them? How do you record and calculate your exemptions and abatements? All these values on a spreadsheet – how do they get into PTMS quickly and efficiently? These questions and more will be addressed as we explore a more robust way of using Values. A fellow PTMS professional, Jon Stokes from The Coca-Cola Company, will share best practices for when and how to use value fields, and exemptions and abatements. You will complete hands-on exercises to import values and create exemptions, and explore when those other value fields might come in handy!

**Track:** PTMS - Case Study

**Session ID:** CS-102\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

#### Session Objectives:

- Use the PTMS Assessments and Appeals Manager to easily view, manage, and report values
- Set up exemptions in PTMS and review the impact on your property
- Enter value abatements into PTMS and understand how the abatement allocates to property
- Import values from an external file
- Determine when to use alternate values for your tax reporting needs

#### Day & Time:

- Tuesday 10:30 a.m. – 12:00 p.m.

## CS-103 Insight Every Day: Using Insight for PTMS **NEW**

Come meet Paula Garrison and Jackie Cervantes from ConocoPhillips. Together with Melissa Schad, TCI Software Consultant, ConocoPhillips went from frustrated Dashboard users to advocates for Insight for PTMS! They will discuss the initial setup and data challenges they experienced as well as the solutions and lessons they learned along the way. They will also discuss their current query process and best practices.

**Track:** PTMS - Case Study

**Session ID:** CS-103

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Review underlying data requirements and best practices
- Identify most valuable queries and their uses
- Avoid issues that create undesirable results
- Optimize efficiency with the mobile app on your iPad or phone

### Day & Time:

- Tuesday 10:30 a.m. – 12:00 p.m.

## CS-104 PTMS Checkup: Optimize for the Win **NEW**

Do you ever wonder how folks run their tax departments? Ever wish you could ask them about their experiences or the benefits of using a consultant? If so, join us as Gregg West from Vulcan Materials discusses his experiences.

**Track:** PTMS - Case Study

**Session ID:** CS-104

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Understand the approach used by Vulcan Materials to develop a tax team
- Learn about their use of consultants
- Discuss benefits of customized utilities
- Have an opportunity to ask questions

### Day & Time:

- Wednesday 2:45 p.m. – 4:00 p.m.

## CS-303 Accruing Knowledge about PTMS

### Accruals

If you have been tasked with or are currently preparing your property tax accruals outside of PTMS, then this is the session for you. Jessica Griffith from Lowe's Companies, Inc. will share experiences with implementing, using, and managing the PTMS accrual process.

**Track:** PTMS - Case Study

**Session ID:** CS-303

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Advanced

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-202, TAX-204\* or equivalent experience

**Advanced Preparation:** None

#### Session Objectives:

- Identify which data elements are required to create an accrual in PTMS
- Select the proper PTMS Options to meet your organization's accrual reporting requirements
- Create and export journal entries for each reporting period
- Adjust accruals to account for new property or changes to data in PTMS

#### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## PTMS Data Management (DM) Track

### DM-101\* Pros of Configurations: Optimizing PTMS Grids, Imports, and Reports

Maximize the use of your PTMS screens by focusing your attention on the key information columns in your property grids, import configurations, and report grids.

**Track:** PTMS - Data Management

**Session ID:** DM-101\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Determine the differences between the various types of configurations in PTMS
- Create grid configurations with filtering, sizing, and grouping
- Share configurations with others
- Manage grid configurations in various areas of PTMS

#### Day & Time:

- Wednesday 2:45 p.m. – 4:00 p.m.

### DM-201\* PTMS Imports: Tips and Strategies for Success

Having clean and accurate data in PTMS is key to your success. Discover strategies for successful importing of data, including: planning, avoiding common snags, and quickly resolving data issues. Discover tools that will help you review your data and ensure that you are set up to succeed.

**Track:** PTMS - Data Management

**Session ID:** DM-201\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

#### Session Objectives:

- Identify tips for successful importing through the use of planning strategies
- Avoid common data obstacles through familiarity with record requirements
- Discover import review tools available in the Import Manager
- Uncover common causes of import errors
- Examine resolutions to common data errors for different import types

#### Day & Time:

- Wednesday 9:15 a.m. – 10:30 a.m.

## DM-202\* See the Difference: Comparing Values and Taxes on PTMS Reports

“I paid how much?” Do you need to know what you reported and paid in taxes for last year? How about this year? What about the property that you disposed of last year or moved to another location? The Value/Tax Comparison Report can give you an accurate comparison of this year’s values to last year’s values. We will examine this powerful report in detail, discussing how and when you would use it, troubleshooting tips, and more.

**Track:** PTMS - Data Management

**Session ID:** DM-202\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Identify the PTMS data and fields that must be populated to generate the report
- Generate a value comparison report showing the prior year and current year (all property records)
- Analyze the results and how to troubleshoot the report

### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.

## DM-203\* See the History: Using the PTMS Tax History Reports

While working with tax bills and payments in PTMS, have you ever thought, “This is a great report but I’m missing one piece of data?” Then this may be the class for you. We will be looking at two Tax Reports designed by clients just like you to get an overview of the total tax picture. You will learn how to determine if your bill was added to a check request, if the check request was exported, and which GL account was assigned. These and many other compelling questions about PTMS Tax History features will be reviewed and discussed.

**Track:** PTMS - Data Management

**Session ID:** DM-203\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Build and save reports that meet your organization’s requirements
- Choose the right report for your situation
- Report on the payment status of each PTMS bill

### Day & Time:

- Wednesday 10:45 a.m. – 12:00 p.m.

## DM-204\* See the Bills: Using the PTMS Missing Bills Report

The Missing Bills Report can help you better manage your tax bill payment processing in PTMS. We will look at the Missing Bills Report in detail, discussing how you can use and troubleshoot this report.

**Track:** PTMS - Data Management

**Session ID:** DM-204\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Identify the PTMS data that must be populated to generate the report
- Generate and modify a Missing Bills report
- Create a report of all tax bills expected or processed within a date range
- Gain experience with troubleshooting this report

### Day & Time:

- Wednesday 9:15 a.m. – 10:30 a.m.

## DM-205\* Insight in Your Hands: Using Insight for PTMS

Insight can provide you with an easier way to identify outstanding tasks, review deadlines, run key reports, and receive notifications on upcoming filings and bills due, as well as other work triggers that allow workflow to occur in a timely manner.

**Track:** PTMS - Data Management

**Session ID:** DM-205\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Create a 2017 calendar to drive Insight using template data provided for required events
- Change filing requirements in PTMS Options for four states
- Populate Returns History with five returns using options selected in prior steps
- Generate a Past Due Returns query for all past due returns in the system
- Identify three data points that are causing errors in Assessment To-Do queries
- Correct data for two collector accounts causing review errors
- Create a subscription for check requests ready to approve

### Day & Time:

- Wednesday 2:45 p.m. – 4:00 p.m.



## **DM-301\* Advanced Tips and Tricks to Get More from PTMS**

PTMS tracks a variety of information about your data behind the scenes as you work. This session will help you use this information to identify and troubleshoot common issues as well as share information with other PTMS users at your organization. Apply communication tools and tips within PTMS to ensure optimal collaboration and consistency among your property tax compliance colleagues. Keep your system “lean and mean” by minimizing the number of PTMS records and accounts that are no longer required in current or future tax reporting years. We will also cover troubleshooting common PTMS issues and ways to optimize PTMS using less well-known features.

**Track:** PTMS - Data Management

**Session ID:** DM-301\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### **Session Objectives:**

- Customize your PTMS system to streamline your commonly used functions
- Explore the types of information that PTMS creates, tracks, and stores in your property records
- Optimize grids to expose information you may not realize is available, and discover ways to utilize this data when troubleshooting common issues
- Create and store your own “behind-the-scenes” data
- Use PTMS to communicate and share important data with co-workers
- Identify inactive accounts and sites and properly filter out results
- Activate options that will enhance your PTMS reporting and value review

### **Day & Time:**

- Tuesday 8:45 a.m. – 10:15 a.m.



## PTMS General Session (GS) Track

### GS-001 Opening Bid: User Conference Kick-Off

Kick off the conference, find out what's new, and see where we're headed at this opening session. You'll also learn important details about conference activities and events, so don't miss it.

**Track:** All - General Session

**Session ID:** GS-001

**Duration:** 30 min

**CPE Credit:** 0

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

**Day & Time:**

- Tuesday 8:00 a.m. – 8:30 a.m.

### GS-002 Closing the Deal: User Conference Final Session

This year's Conference Final Session will be both informative and fun, so don't miss out. The session will also include prize drawings and will wrap up the team competition.

**Track:** All - General Session

**Session ID:** GS-002

**Duration:** 1 hr

**CPE Credit:** 0

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

**Day & Time:**

- Wednesday 4:00 p.m. – 5:00 p.m.

## PTMS Elective (ELE) Track

### ELE-001 Skills Boost: Effective Communication for Compliance Professionals **NEW**

Ever feel like you are not communicating effectively with others? Would you like to improve your communication skills? This professional development session will focus on boosting your skills as a communicator by exploring the history and theories of communication, establishing a foundation for effective communication, and showing you how to better communicate in real world scenarios.

**Track:** All - Professional Development

**Session ID:** ELE-001

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Learn about the history and theories of communication
- Obtain a working knowledge of effective communication foundations
- Feel more confident when communicating with others

#### Day & Time:

- Tuesday 1:30 p.m. – 3:00 p.m.

### ELE-002 Skills Boost: Negotiation Skills for Compliance Professionals **NEW**

Negotiation is a key skill for success in business and life. You can become a better negotiator by following some very simple rules. This professional development session will focus on boosting your negotiation skills by exploring the theories of negotiation, explaining the techniques of negotiation, and showing you how to be more calculated about your role in negotiations.

**Track:** All - Professional Development

**Session ID:** ELE-002

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Learn about negotiation theories
- Obtain a working knowledge of negotiation techniques
- Feel more confident when negotiating with others

#### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.

## ELE-101\* Excel and the Basics

Optimize your productivity with PTMS and LicenseHQ through the use of Microsoft Excel. In this session designed for beginners, you will discover useful attributes of this powerful tool – from simple time-saving tricks to more robust features. Discover how Microsoft Excel can help you be more efficient in completing your daily tasks.

**Track:** All - Data Management

**Session ID:** ELE-101\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Review common Microsoft Excel terminology
- Identify navigation efficiencies through the use of tabs, menus, and ribbons
- Employ tools for formatting and performing calculations
- Utilize methods for easily creating charts and graphs
- Relate common data conversion issues
- Apply Excel functionality to manage data for use with TCI products

### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## ELE-201\* Excel Beyond the Basics

Optimize your productivity with PTMS and LicenseHQ through the use of Microsoft Excel. This session will cover handy practical Excel features such as vlookups, macros, functions, and arrays. In this hands-on class we will walk through the how and why of each utility, and work on examples of each.

**Track:** All - Data Management

**Session ID:** ELE-201\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** ELE-101\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Analyze functions and apply them to your own work
- Compose macros to be used again and again
- Construct vlookups to assist in troubleshooting matching records
- Define arrays and explain their usefulness in your data

### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.

## **ELE-202\* Excel Like No Other (Pivot Tables)**

You have a spreadsheet, it has thousands of records, you need to sum everything up with just a few fields – and then you need a graph of the information. What you really need is a Pivot Table! Come to this session to transform your data into information that is useful and meaningful to you.

**Track:** All - Data Management

**Session ID:** ELE-202\*

**Duration:** Tue: 1 hr 30 min; Wed: 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** ELE-101\* or equivalent experience

**Advanced Preparation:** None

### **Session Objectives:**

- Create a pivot table from an Excel spreadsheet
- Generate a graphical representation of data
- Update and modify your pivot table based on changes to the original spreadsheet

### **Day & Time:**

- Tuesday 1:30 p.m. – 3:00 p.m.
- Wednesday 2:45 p.m. – 4:00 p.m.

## PTMS Sponsor (SP) Track

### SP-001 Updates and Trends in Property Tax (Presented by DuCharme, McMillen & Associates, Inc.)

This session will cover the latest developments and trends in property tax compliance. A range of topics will be discussed, including exemptions, recent updates to state tax laws, new filing deadlines, changes to jurisdictional reporting requirements, and more.

**Track:** PTMS - Sponsor

**Session ID:** SP-001

**Duration:** Tue: 1 hr 30 min; Wed: 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

**Day & Time:**

- Tuesday 1:30 p.m. – 3:00 p.m.
- Wednesday 10:45 a.m. – 12:00 p.m.

### SP-002 Recent Changes and Emerging Challenges in Property Tax (Presented by Grant Thornton, LLP)

Get a glimpse of the future and a review of the current property tax environment. Learn about the impact of recent decisions related to the denial of Not-for-Profit exemptions as well as the possible implications of the upcoming adoption of the ASC 842 – Leasing Standards beginning in 2019 and 2020.

**Track:** PTMS - Sponsor

**Session ID:** SP-002

**Duration:** Tue: 1 hr 30 min; Wed: 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

**Day & Time:**

- Tuesday 10:30 a.m. – 12:00 p.m.
- Wednesday 1:15 p.m. – 2:30 p.m.

## **SP-003 Benchmarking 101: Getting the Data You Need to Make Informed Decisions (Presented by Paradigm Tax Group, LLC)**

Learn how benchmarking best practices and other technology can guide the property value conversation. The session will highlight the various approaches to value and how each approach helps decision makers focus their attention where they can maximize ROI.

**Track:** PTMS - Sponsor

**Session ID:** SP-003

**Duration:** Tue: 1 hr 30 min; Wed: 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### **Day & Time:**

- Tuesday 3:15 p.m. – 4:45 p.m.
- Wednesday 9:15 a.m. – 10:30 a.m.

## PTMS Tax (TAX) Track

### TAX-001 What's New in PTMS **NEW**

My, has PTMS grown! Come check out the latest and greatest in PTMS functionality and features. Many changes have been made to make your PTMS life a lot better and easier, so here is your chance to see it in person!

**Track:** PTMS - Tax

**Session ID:** TAX-001

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Discover the changes included in the upcoming PTMS 9.0 release
- Review Wall of Feedback items and see what was included in this release

#### Day & Time:

- Tuesday 8:45 a.m. – 10:15 a.m.

### TAX-101 Filing through Everything: Optimal Return Workflows in PTMS **NEW**

Yes, you can get a report of all the returns you printed last year! This session will go over all the options available for seeing that the returns were printed, when they were printed, how they were printed, who printed them, and more. We'll also look into how the return history connects to the Calendar and to PTMS Insight.

**Track:** PTMS - Tax

**Session ID:** TAX-101

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

#### Session Objectives:

- Create a report of returns printed over a return season
- Compose multiple grid configurations to review various groups of useful information
- Inspect a return without going out of PTMS
- Organize system setup for reviews and approvals in Returns History, Calendar, and User Manager
- Appraise the return status information in Insight

#### Day & Time:

- Wednesday 9:15 a.m. – 10:30 a.m.



## TAX-102\* From Values to Payments: Optimal Workflows in PTMS **NEW**

Take PTMS beyond the return filing season and start tracking your values and payments in PTMS. In this session you will learn how to utilize the Calendar to track notice and payment dates. You will also enter assessed values and payments with approvals.

**Track:** PTMS - Tax

**Session ID:** TAX-102\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Configure the Calendar and PTMS Options to support your workflow preferences
- Organize approval setup in User Manager, values, and payments
- Enter assessment notice values
- Process tax bill payments

### Day & Time:

- Wednesday 2:45 p.m. – 4:00 p.m.

## TAX-103\* In a Certain State: Using PTMS for Complex Billing Jurisdictions and Returns **NEW**

Every year, certain states have us scratching our heads and searching our notes for how we did it last year. This session combines all of those fun nuances into one presentation. You will learn tax return and payment tips for some of the most challenging states.

**Track:** PTMS - Tax

**Session ID:** TAX-103\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Prepare inventory, vehicle, and prior-year data for states where it's required: North Carolina, Texas, Louisiana, and Georgia
- Identify states that have exemptions: Michigan and Texas
- Assign reporting subjurisdictions to Michigan and Wisconsin
- Organize data for billing in Texas and Michigan

### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## TAX-104\* Who's Your Return? Hoosier Return. PTMS and Indiana **NEW**

Do you internally frown every year when you think about preparing Indiana Returns? It's time to turn that frown upside down and learn how to love the Hoosier state. This hands-on session will include setup tips for generating Indiana returns and review guidelines provided by an active Indiana assessor.

**Track:** PTMS - Tax

**Session ID:** TAX-104\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Identify the correct form using PTMS resources
- Assign reporting jurisdictions
- Complete the requirements to file the exemption
- List the steps to calculate True Tax Value
- Configure the 103-ERA

### Day & Time:

- Wednesday 1:15 p.m. – 2:30 p.m.

## TAX-105\* PTMS for Lessors: Importing and Tracking Property **NEW**

From before lease inception through lease termination, PTMS can handle tax compliance for property that you lease to others. Come learn tips for not only importing leased property, but also for ensuring accurate property information and streamlining processes, such as reporting, billing, and billbacks. This session covers preparing PTMS for receiving and setting up leased property in the system for the full property tax cycle and life of the lease.

**Track:** PTMS - Tax

**Session ID:** TAX-105\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Review various PTMS settings to understand their short and long-term effects on the property items imported
- Explore time-saving solutions that will reduce analysis and processing time of property information
- Optimize the use of Import Manager features to streamline importing and ensure data accuracy
- Discover how PTMS helps track property movements and related information
- Work with property information to interpret and use the data recorded for each movement

### Day & Time:

- Tuesday 10:30 a.m. – 12:00 p.m.

## TAX-106\* PTMS for Lessors: Entering Values and Paying Bills **NEW**

As if processing large numbers of value notices and tax bills weren't enough, lessors also must ensure that their lessees are allocated their fair share of value and taxes. This session will review various methods of entering values, billing tips, and refund processing.

**Track:** PTMS - Tax

**Session ID:** TAX-106\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Gain an understanding of how your system options impact value allocations and tax bill processing
- Understand how setting up the Calendar reduces data entry
- Import values using three different types of imports, and identify which method to use based on the information that was provided to you
- Process a refund tax bill

### Day & Time:

- Tuesday 1:30 p.m. – 3:00 p.m.

## TAX-107\* PTMS for Lessors: Getting Results with Reports and Insight **NEW**

The Reports Manager and Insight for PTMS can be used to communicate the state of your leased property no matter where you are in the property tax cycle.

**Track:** PTMS - Tax

**Session ID:** TAX-107\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Generate reports in the PTMS Reports Manager
- Use the Reports Manager to help navigate the tax bill cycle
- Employ the Reports Manager to highlight and troubleshoot missing entries in your tax bill process
- Use Insight to identify trends in property valuation, billing, and taxation

### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## TAX-108 PTMS Gets Real: Payments, Reports, and Insight **NEW**

This session will focus on real property – best practices for setting up payments, getting valuable user and management reports, and using Insight to ensure high-value notices and bills are addressed on time!

**Track:** PTMS - Tax

**Session ID:** TAX-108

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Assign both a collector account and a billing jurisdiction to five parcels, including an alternate payee
- Process five tax bills with no errors upon save
- Create all available check requests for each collector account/payee combination for processed bills
- Export all available check requests to an Excel file using the provided configuration
- Generate a Missing Bills report for all parcels with zero tax liability to date
- Generate a value query from Insight comparing four years of value trends
- Produce an outstanding bills by billing jurisdiction report from Insight

### Day & Time:

- Tuesday 1:30 p.m. – 3:00 p.m.

## TAX-109 PTMS Gets Real: Imports, Property, and Values **NEW**

During this session you will learn how to manage your Real Estate properties using detail information in PTMS. Explore the different ways to review your values and property detail information, and the tools available to capture your real property information.

**Track:** PTMS - Tax

**Session ID:** TAX-109

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Basic

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** None

**Advanced Preparation:** None

### Session Objectives:

- Gather your data and create a project plan and team for loading data into PTMS
- Review the import process for loading your real estate into PTMS
- Create grid configurations for value management, reporting, and appeals

### Day & Time:

- Tuesday 10:30 a.m. – 12:00 p.m.

## **TAX-201\* For the Form and the Value: Managing PTMS Assessment Classifications**

Managing all of the PTMS return forms, state classes, and values can be overwhelming. Sometimes it might seem like it's easier to do it manually. But wait! Come to this hands-on session to learn how to manage advanced classification and mapping scenarios to ensure PTMS classifies your property properly, and correctly calculates your property values.

**Track:** PTMS - Tax

**Session ID:** TAX-201\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101 or equivalent experience

**Advanced Preparation:** None

### **Session Objectives:**

- Customize and apply assessment classifications
- Complete the prerequisites for complex tax forms
- Create exceptions to the default classifications rules

### **Day & Time:**

- Tuesday 8:45 a.m. – 10:15 a.m.

## **TAX-202 Deep Dive into PTMS Value and Tax Allocations**

If you have ever wondered where a number in PTMS came from, come to this session to dive under the surface and see how PTMS calculates reported costs. You will also discover how PTMS allocates amounts from assessment notices and tax bills to individual property records as well as why it is important to understand how PTMS performs these calculations.

**Track:** PTMS - Tax

**Session ID:** TAX-202

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### **Session Objectives:**

- Understand the PTMS Options that impact value and tax allocations
- Learn how reported costs in PTMS can affect value allocations
- Review the calculations PTMS uses to allocate values and taxes to property

### **Day & Time:**

- Wednesday 1:15 p.m. – 2:30 p.m.

## TAX-203\* Easier Value and Payment Processing with Document and Capture for PTMS

Reduce data entry time and have all necessary documents at your fingertips using Document and Capture for PTMS. We'll review the implementation process, scanning and validating documents, importing bills and notices, and generating returns that are saved in Document for PTMS.

**Track:** PTMS - Tax

**Session ID:** TAX-203\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Open PDF images of returns, notices, bills, and other attachments within PTMS
- Assess and complete setup requirements
- Submit scans through Front Office
- Validate accuracy of scanned documents prior to creating files
- Import files from scans with no data entry
- Access and maintain documents in single-point, web-based system
- Solve common troubleshooting issues

### Day & Time:

- Wednesday 10:45 a.m. – 12:00 p.m.

## TAX-204\* Peer into the Future with PTMS Forecasting and Advanced Estimating

During this session, you will create property tax estimates using both the PTMS Forecasting and Advanced Estimating modules. This session will explore the similarities and differences between both tools, helping you to determine which one best meets the needs of your organization.

**Track:** PTMS - Tax

**Session ID:** TAX-204\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-101, TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- List the requirements for creating forecasts and advanced estimates in PTMS
- Employ PTMS to identify and populate the "Best Known Value" for property records
- Create forecasts and advanced estimates in PTMS
- Discover the advantages of each tool

### Day & Time:

- Wednesday 9:15 a.m. – 10:30 a.m.

## TAX-205 Appeals Made Simple: AppealTrack Overview

Managing appeals in our newest product, AppealTrack, allows you to manage real property appeals, centralize appeal documentation, minimize tax liability, maximize tax savings, track negotiations with jurisdictions, pay tax bills, issue check requests, and invoice customers, all within a completely web-based platform designed for use by both consultant and corporate users alike. Join this overview session and see everything AppealTrack can do!

**Track:** PTMS - Tax

**Session ID:** TAX-205

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** No

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Create and update company profiles, property records, and parcel information
- Manage appeals and generate appeal forms
- Use batch features to quickly update records
- Create custom merge documents
- Manage deadlines
- Attach electronic documents
- Generate customer invoices
- Process tax bills and issue check requests
- Discover standard reports and how to build a custom report
- Manage the Events Calendar and Outlook integration workflow
- Create client dashboards

### Day & Time:

- Tuesday 3:15 p.m. – 4:45 p.m.

## TAX-206\* Appeals Made Simple: Hands-On with AppealTrack **NEW**

Centralize. Systemize. Organize. Managing appeals in our newest product, AppealTrack, allows you to manage real property appeals, centralize appeal documentation, minimize tax liability, maximize tax savings, track negotiations with jurisdictions, and invoice customers, all within a completely web-based platform. Join this hands-on session and see everything AppealTrack can do!

**Track:** PTMS - Tax

**Session ID:** TAX-206\*

**Duration:** 1 hr 15 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Intermediate

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\* or equivalent experience

**Advanced Preparation:** None

### Session Objectives:

- Create and update client profiles, property records, and parcel information
- Generate appeal forms
- Attach electronic documents and communications
- Generate customer invoices
- Manage all appeal filing and case deadlines to ensure none are missed
- Utilize batch functionality to quickly update records
- Discover standard reports and how to build a custom report
- Create custom merge letters
- Manage the Events Calendar and Outlook integration workflow

### Day & Time:

- Wednesday 10:45 a.m. – 12:00 p.m.

## TAX-302\* PTMS Payments: Advanced

### Scenarios and Topics

Ever wondered how to manage those Texas billing jurisdictions? Or how to exclude property from a bill? Then this hands-on session is for you. Move beyond basic bill processing and learn how to manage payment exceptions in the PTMS Payment Manager.

**Track:** PTMS - Tax

**Session ID:** TAX-302\*

**Duration:** 1 hr 30 min

**CPE Credit:** 1.5

**Hands-on:** Yes

**Session Level:** Advanced

**Subject Area:** Specialized Knowledge & Applications

**Prerequisite:** TAX-102\*, TAX-202 or equivalent experience

**Advanced Preparation:** None

#### Session Objectives:

- Summarize how to process payments for multiple jurisdiction levels
- Exclude property from bills using the Standard Entry and Quick Entry methods
- Demonstrate how to manage check requests
- Identify how to update billing jurisdiction assignments
- Use the AR Reset and AP Reset utilities

#### Day & Time:

- Tuesday 1:30 p.m. – 3:00 p.m.

