

2018 CSC TCI User Conference

August 20 - 21 :: Pendry San Diego :: San Diego, CA

Conference Curriculum



Contents

Looking for more information related to the sessions available at the [2018 CSC 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 20-21, 2018 at The Pendry Hotel in San Diego, California 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

Boost or jump-start your solution training, enroll in best practice sessions, and spend time networking with other professionals.

Receive One-on-One Attention

Connect face-to-face with the 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 [2018 CSC 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 2018 CSC TCI® User Conference, visit tcusercontent.com.

What the Fee Covers

2-Day Registration—\$1,295

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

Group Rate

Companies sending three or more attendees to the 2018 CSC TCI® User Conference will receive a special group rate for each attendee they send (\$1,195 for 2-Day Registration). Please contact traininginfo@cscglobal.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 10, 2018. Cancellations received after August 10, 2018 and no-shows will be charged the full User Conference fee. Cancellation notices must be sent via email to traininginfo@cscglobal.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 CSC TCI® staff?

If these are your goals for attending the 2018 CSC 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 CSC 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 Session

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.

TAX-206 Feel the Power of Appeals: AppealTrack Overview

AppealTrack allows you to track appeal-related tasks and requirements, generate appeal forms, centralize appeal documentation, minimize tax liability, maximize tax savings, and easily track your real property portfolio. It can also help you manage third-party consultants, track negotiations with jurisdictions, pay tax bills, and issue check requests. AppealTrack does all of this within a completely web-based platform designed for use by both consultant and corporate users alike. Join this lecture session, and see everything AppealTrack can do!

Track: PTMS - Tax

Session ID: TAX-206

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 functionality 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
- Assign third-party consultants to property
- Define user access rights

Day & Time:

Monday 3:15 p.m. – 4:45 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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LicenseHQ Case Study (CS) Track

CS-105 LicenseHQ and Mergers: Controlling Organizational Fusion **NEW**

Are you acquiring a new company? Has your company recently merged with another? Learn from the experiences of your fellow LicenseHQ user, Bass Pro Inc., and discover how they handle the licensing and ownership changes for their growing company with LicenseHQ.

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 to manage the many licenses across multiple companies
- Use LicenseHQ to track the change of ownership for new locations
- Explore the options for notifications and how to stay up-to-date with the merging companies

Day & Time:

Monday 10:30 a.m. – 12:00 p.m.



LicenseHQ Data Management (LHQ) Track

LHQ-100* Hit Peak Efficiency in LicenseHQ: Tips and Tricks **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 features 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-100*

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:

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

Day & Time:

Tuesday 9:15 a.m. – 10:30 a.m.

LHQ-101* Recharge Your Licenses: Payments and Renewals in LicenseHQ

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 a license renewal and payment expert as well as the ability to avoid common mistakes through 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:

- Identify and configure applicable LicenseHQ workflow tasks
- Build and save an AP exports
- Interpret the Dashboard Task List
- Renew and process payments for a single license or a set of licenses in batch
- Apply payment and renewal options
- Identify and troubleshoot issues in the renewal and payment process

Day & Time:

Monday 10:30 a.m. - 12:00 p.m



LHQ-102* Powered by Data: LicenseHQ Forms

The LicenseHQ Forms Database is a powerful resource, which saves time through its one-stop-shop concept. You can also search for forms from multiple areas of LicenseHQ. Come see all of the exciting features that make searching for forms and creating new licenses more efficient.

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:

- Recognize the four methods to search for forms
- Create license records from the Forms module
- Attach forms to existing license records
- Identify newly saved filters
- Operate the in-grid filtering

Day & Time:

Tuesday 9:15 a.m. – 10:30 a.m.

LHQ-103* Get Connected with LicenseHQ Notifications and Reports **NEW**

Are you tired of notifying others individually as licenses are coming due? Do you want reports and notifications to be sent to you and other departments automatically? Learn how to be more efficient using LicenseHQ custom reports and notifications in this hands-on session.

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 how to setup Site Notifications for on-site managers
- Create custom LicenseHQ reports
- Configure "cross-module" reports
- Work with the custom Tasks report
- Customize notifications based on task details
- Email and schedule custom reports
- Send custom reports to anyone, including external email addresses

Day & Time:

Monday 3:15 p.m. – 4:45 p.m.



LHQ-104* LicenseHQ Dashboard Confessional: Get All the Data **NEW**

If you find you have begun ignoring your Dashboard, knowing the Past Due items aren't really past due—or you don't know if they are past due—then this session is for you! We'll discuss common reasons for the Dashboard becoming out of sync with reality, how to identify why this happens, strategies for fixing the issues, and workflow best practices for avoiding future problems.

Track: LicenseHQ - Data Management

Session ID: LHQ-104*

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:

- Identify and resolve renewal backlog
- Correct workflow discrepancies causing issues
- Organize received licenses for efficient updating
- Resolve payment requirement problems
- Review current AP process to ensure accurate check requests
- Uncover hidden fields to help you manage your records
- Create custom reports to track cleanup project process
- Document changes to your workflow and the LicenseHQ system to improve accuracy, timely compliance, and avoidance of penalties and violations

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

LHQ-201* Data Flows: LicenseHQ Imports and Exports **NEW**

LicenseHQ is a powerful tool for managing the flow of your data. The combination of features available for importing data, reviewing tasks, and performing batch updates can help you stay on top of important deadlines. In this session, you will learn about ways to efficiently manage your renewals, payments, and location statuses. Come join us and discover 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
- Learn how to quickly update a batch of data
- Select and update multiple records
- Analyze and update the Dashboard task list
- Create and manage location tasks

Day & Time:

Monday 3:15 p.m. – 4:45 p.m.

LHQ-202 Smarter and Faster: Automating Steps in LicenseHQ **NEW**

Do you feel overwhelmed at the office? Would you like to stop spending so much time manually updating your records and automate some of your mundane daily processes? This session will provide information about system tools and utilities that can help increase the efficiency of your daily routine.

Track: LicenseHQ - Data Management

Session ID: LHQ-202

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:

- Identify processes to automate record updates
- Discuss common use cases for the utilities that can update your records
- Create efficient workflow routines
- Learn how the available utilities work

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.

LHQ-203* Resetting the Breaker: Troubleshooting in LicenseHQ

Have you ever: Had trouble figuring out why a license isn't renewable in LicenseHQ? Been unable to 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 explain 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 available for renewal
- Develop the best method of displaying Dashboard data using dates and customization
- Use 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 filters, reports, and exports
- Outline grid configurations to identify data issues

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.

LHQ-204 Amp Up LicenseHQ by Managing Additional Compliance Processes **NEW**

Do you need to amp up your use of LicenseHQ? Come learn how you can manage the data and processes for additional job duties in LicenseHQ. In this session, you will see how LicenseHQ users from accounting, legal, tax, and facility departments are managing more than just licenses in LicenseHQ.

Track: LicenseHQ - Data Management

Session ID: LHQ-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:

- Use LicenseHQ for more than just managing your business licenses
- Discover what additional job duties are common for typical LicenseHQ users
- Learn about the additional modules LicenseHQ offers (Inspections, Vehicles, Contracts, Individuals)
- Explore how each module can be used to address additional job duties and applications
- Obtain instruction on how to start using LicenseHQ for these processes

Day & Time:

Tuesday 2:45 p.m. – 4:00 p.m.

LHQ-205 No Barriers: Optimizing LicenseHQ for Certain Jurisdictions **NEW**

Do the licensing authorities for some jurisdictions make you feel like you are hitting a wall? In this session, we will take a closer look at jurisdictions that cause some of the biggest licensing obstacles. Learn best-practices for dealing with states that base licensing requirements on the point of sale or service and how this affects e-commerce companies, 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-205

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 physical site or store
- Standardize imports of sales, employee records, and other data necessary for renewals
- Learn best practices and network with peers
- Explore which states are the source of the biggest challenges and why

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.

SME-003 Straight from the Top: Jurisdictional Licensing Experts **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 the Hazardous Materials Division (HMD) of San Diego County will be sharing tips for your success!

Track: LicenseHQ - Data Management

Session ID: SME-003

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 who have found solutions to issues you are currently facing
- Discover methods that will reduce processing times and make your life easier
- Explore a whole new world of tips and tricks to drive efficiency throughout your compliance processes

Day & Time:

Monday 8:45 a.m. – 10:15 a.m.

LicenseHQ Elective (ELE) Track

ELE-001 Skills Power-Up: Presentation Skills for Compliance

Professionals **NEW**

Most business presentations range from incredibly boring to, well... just plain boring. Presentation skills and public speaking abilities are not limited to certain special people—anyone can give a good presentation or perform public speaking to a professional and impressive standard. This session provides a guide to the process of creating effective presentations, tips and techniques for successfully delivering presentations, and an explanation and methods for reducing presentation fears and stresses. Come to this session to explore, discuss, and try out techniques to take your presentation to the next level.

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:

- Understand effective and efficient presentation building
- Have a working knowledge of effective presentation techniques
- Feel more confident when presenting

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

ELE-002 Skills Power-Up: 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:

- Be familiar with negotiation theories
- Have a working knowledge of negotiation techniques
- Feel more confident when negotiating with others

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.

ELE-201* Intel on Excel: Everyday Timesavers

Optimize your productivity with PTMS, LicenseHQ, and AppealTrack through the use of Microsoft Excel. This session will cover Excel terminology, some simple time-saving tricks, and how to use "vlookups" and other functions. In this hands-on class, we will walk through the how and why of each feature and work on a few examples of each. We'll work with multiple examples in each exercise, increasing the difficulty to challenge you.

Track: All - Data Management

Session ID: ELE-201*

Duration: 1 hr 30 min

CPE Credit: 1.5

Hands-on: Yes

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: Basic Microsoft Excel knowledge

Advanced Preparation: None

Session Objectives:

- Review common Microsoft Excel terminology
- Learn how to use the Excel toolbar and tabs
- Employ tools for formatting and performing calculations
- Analyze functions and apply them to your own work
- Construct vlookups to assist in troubleshooting matching records

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

ELE-202* Intel on Excel: Pivot Tables and Advanced Topics

You can use Pivot Tables in Microsoft Excel to turn your mountain of data into useful information. In addition, you can make graphs, update data, and amaze your friends.

Track: All - Data Management

Session ID: ELE-202*

Duration: 1 hr 15 min

CPE Credit: 1.5

Hands-on: Yes

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: Basic Microsoft Excel knowledge

Advanced Preparation: None

Session Objectives:

- Create a Pivot Table from data extracted from PTMS or LicenseHQ
- Create a graph of your data, and learn how to pick the style of graph that best works for you
- Analyze, review, and update the data to get meaningful results

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.

LicenseHQ General Session (GS) Track

GS-001 Power On: 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:

Monday 8:00 a.m. – 8:30 a.m.

GS-002 Lights Out: User Conference Final Session

This year's Conference Closing 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:

Tuesday 4:00 p.m. – 5:00 p.m.



PTMS Sessions

No matter what industry you are in, PTMS will reduce both your workload and your taxes. Master the core system or learn 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* Boost Your Value by Tracking Additional Values in PTMS **NEW**

Come see what values can mean to you as a tax professional. Learn best practices for when and how to use value fields as well as 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-101*

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 Assessment 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:

Monday 10:30 a.m. – 12:00 p.m.

CS-201 The Path to Enlightenment and Happy Accruals in PTMS

Learn from the experiences of fellow PTMS customers, and discover the strategies they employed to streamline their accruals process. See the flexibility and capabilities available in PTMS to create accruals specific to the needs of your company. Additionally, Tyler Dowell of K.E. Andrews will share his experiences implementing, using, and managing the PTMS accrual process.

Track: PTMS - Case Study

Session ID: CS-201

Duration: 1 hr 30 min

CPE Credit: 1.5

Hands-on: No

Session Level: Advanced

Subject Area: Specialized Knowledge & Applications

Prerequisite: TAX-203, TAX-204*, or equivalent experience

Advanced Preparation: None

Session Objectives:

- Examine a case study for an accrual implementation
- 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
- Adjust accruals to account for new property or changes to data in PTMS
- Understand the accruals implementation process and support provided

Day & Time:

Monday 3:15 p.m. – 4:45 p.m.

PTMS Data Management (DM) Track

DM-101* Intelligent Configurations for PTMS Grids, Imports, and Reports

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

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 filters, column sizes, and groups
- Share configurations with others
- Manage grid configurations in various PTMS modules

Day & Time:

Tuesday 9:15 a.m. – 10:30 a.m.

DM-201* Imparting Wisdom: Importing Data into PTMS

Importing data into PTMS is an easy task. Planning and configuring your import, however, is where the challenge lies. Join us to learn proven strategies for successfully importing data into PTMS, including tips for preparing data, avoiding common pitfalls, and quickly resolving import errors. 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 imports through the use of planning strategies
- Avoid common data obstacles through familiarity with record requirements
- Discover import review tools available in the PTMS Import Manager
- Uncover common causes of import errors
- Examine resolutions to common data errors for different import types

Day & Time:

Tuesday 9:15 a.m. – 10:30 a.m.

DM-202* PTMS Reporting Intelligence **NEW**

I need a report, but which one? 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? We will review the PTMS Reports Manager in detail, discussing how and when you would use each report, and how to troubleshoot the report results.

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:

- Review the reports available and discover the common tools to generate reports
- Identify the PTMS data and fields that must be populated to generate a report
- Generate a reconciliation report and value comparison report showing the prior year (all property records) and current year (all property records)
- Analyze the results and learn how to troubleshoot the reports

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.

DM-204* PTMS Reporting Intelligence: Values and Payments **NEW**

Have you ever thought, "I need a go-to report for missing bills" or maybe wondered, "is there is a better way to check on the status of processed bills?" If so, this may be the session for you. It will cover the PTMS reports that provide a total tax picture. You will learn how to determine which bills are still outstanding and how to create reports on processed bills. You will create reports based on the GL accounts used when creating check requests.

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:

- Build, save, and share reports that meet your organization's requirements
- Identify the key PTMS data that must be populated to generate a report
- Generate a Missing Bills Report as well as a Tax History by GL Account and Installments Report
- Create a report of all tax bills expected or processed within a date range
- Gain experience with troubleshooting reports

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.



DM-205* Powerful Insights: Hands-On with Insight for PTMS

Insight for PTMS can provide you with an easier way to identify outstanding tasks, review deadlines, and run key reports. It can also send notifications on upcoming filings and bills due as well as other work events to help you stay on top of your compliance workflow.

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:

- Navigate and customize the Insight Home tab
- Create a calendar using templates to populate Insight
- Deploy and modify query criteria
- Identify key items to review for troubleshooting query results

Day & Time:

Tuesday 2:45 p.m. – 4:00 p.m.

DM-208* Recharge Your Data: Handling Company Changes and Inactive Data in PTMS **NEW**

Have you ever wondered about the best way to manage and streamline your data in PTMS? Join us to discuss how PTMS can adapt to your business as it grows and changes. Topics will include ways to make PTMS easier to navigate, limit grids to only active data records, and handle changes to your internal business data.

Track: PTMS - Data Management

Session ID: DM-208*

Duration: 1 hr 15 min

CPE Credit: 1.5

Hands-on: Yes

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: None

Advanced Preparation: None

Session Objectives:

- Learn how to manage accounts
- Change your asset numbers using a "replacement" utility
- Review and assign billing jurisdictions
- Use update imports and other shortcuts to "clean" your property data

Day & Time:

Tuesday 2:45 p.m. – 4:00 p.m.

DM-209 Potential Energy: How to Automate PTMS Tasks **NEW**

Would you like to make your PTMS life easier? Are you finding periodic tasks in the software to be too time consuming or thinking, "there must be a better way?" Well, there probably is! PTMS includes several tools, processes, and utilities that allow users to perform tasks in many different ways. From database maintenance to administrative tasks, we will walk through tools you have available to you in the system, and we will also discuss customizations that will make your use of PTMS more automated and all-around easier!

Track: PTMS - Data Management

Session ID: DM-209

Duration: 1 hr 15 min

CPE Credit: 1.5

Hands-on: No

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: None

Advanced Preparation: None

Session Objectives:

- Learn importing shortcuts and how to do more with imports
- Find data in PTMS quickly
- Process payments with less effort and data entry
- Review standard utilities and common customizations

Day & Time:

Tuesday 9:15 a.m. – 10:30 a.m..

DM-301* Save Time and Energy with PTMS Tips and Tricks

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. In addition, we will apply communication tips and tools within PTMS to ensure optimal collaboration and consistency with your property tax compliance colleagues. You will be able to keep your system "lean and mean" by hiding PTMS records and accounts that are no longer required in the current or future tax reporting years. We will also cover troubleshooting common PTMS issues and problems 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 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 use 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
- Inactivate accounts and sites, and properly filter out these records from your results
- Activate options that will enhance your PTMS reporting and value review

Day & Time:

Monday 10:30 a.m. – 12:00 p.m.



PTMS Elective (ELE) Track

ELE-001 Skills Power-Up: Presentation Skills for Compliance

Professionals **NEW**

Most business presentations range from incredibly boring to, well... just plain boring. Presentation skills and public speaking abilities are not limited to certain special people—anyone can give a good presentation or perform public speaking to a professional and impressive standard. This session provides a guide to the process of creating effective presentations, tips and techniques for successfully delivering presentations, and an explanation and methods for reducing presentation fears and stresses. Come to this session to explore, discuss, and try out techniques to take your presentation to the next level.

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:

- Understand effective and efficient presentation building
- Have a working knowledge of effective presentation techniques
- Feel more confident when presenting

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

ELE-002 Skills Power-Up: 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:

- Be familiar with negotiation theories
- Have a working knowledge of negotiation techniques
- Feel more confident when negotiating with others

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.

ELE-201* Intel on Excel: Everyday Timesavers

Optimize your productivity with PTMS, LicenseHQ, and AppealTrack through the use of Microsoft Excel. This session will cover Excel terminology, some simple time-saving tricks, and how to use "vlookups" and other functions. In this hands-on class, we will walk through the how and why of each feature and work on a few examples of each. We'll work with multiple examples in each exercise, increasing the difficulty to challenge you.

Track: All - Data Management

Session ID: ELE-201*

Duration: 1 hr 30 min

CPE Credit: 1.5

Hands-on: Yes

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: Basic Microsoft Excel knowledge

Advanced Preparation: None

Session Objectives:

- Review common Microsoft Excel terminology
- Learn how to use the Excel toolbar and tabs
- Employ tools for formatting and performing calculations
- Analyze functions and apply them to your own work
- Construct vlookups to assist in troubleshooting matching records

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

ELE-202* Intel on Excel: Pivot Tables and Advanced Topics

You can use Pivot Tables in Microsoft Excel to turn your mountain of data into useful information. In addition, you can make graphs, update data, and amaze your friends.

Track: All - Data Management

Session ID: ELE-202*

Duration: 1 hr 15 min

CPE Credit: 1.5

Hands-on: Yes

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: Basic Microsoft Excel knowledge

Advanced Preparation: None

Session Objectives:

- Create a Pivot Table from data extracted from PTMS or LicenseHQ
- Create a graph of your data, and learn how to pick the style of graph that best works for you
- Analyze, review, and update the data to get meaningful results

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.

PTMS General Session (GS) Track

GS-001 Power On: 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:

Monday 8:00 a.m. – 8:30 a.m.

GS-002 Lights Out: User Conference Final Session

This year's Conference Closing 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:

Tuesday 4:00 p.m. – 5:00 p.m.

PTMS Sponsor (SP) Track

SP-001 Sponsor Session: DuCharme, McMillen & Associates Inc.

Information Coming Soon!

Track: PTMS - Sponsor

Session ID: SP-001

Duration: 1 hr 30 min / 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:

- Information Coming Soon!

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

Tuesday 10:45 a.m. – 12:00 p.m.

SP-002 Sponsor Session: Grant Thornton, LLP

Information Coming Soon!

Track: PTMS - Sponsor

Session ID: SP-002

Duration: 1 hr 30 min / 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:

- Information Coming Soon!

Day & Time:

Monday 10:30 a.m. – 12:00 p.m.

Tuesday 1:15 p.m. – 2:30 p.m.

SP-003 Sponsor Session: Sponsor TBD

Information Coming Soon!

Track: PTMS - Sponsor

Session ID: SP-003

Duration: 1 hr 30 min / 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:

- Information Coming Soon!

Day & Time:

Monday 3:15 p.m. – 4:45 p.m.

Tuesday 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 functionality for PTMS. There have been a lot of changes to PTMS, and these changes will make your life a lot easier! Here is your chance to see it firsthand.

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:

- Review the enhancements released over the past year (9.1, 10.0)
- Discover the changes included in the upcoming PTMS 10.1 release
- Review Wall of Feedback items and see what was included in this release

Day & Time:

Monday 10:30 a.m. – 12:00 p.m.

TAX-101* Energize PTMS: Optimal Return Workflows **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 which 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 Insight for PTMS.

Track: PTMS - Tax

Session ID: TAX-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:

- 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 leaving PTMS
- Organize system setup for reviews and approvals in the Returns History, Calendar, and User Manager
- Appraise the return status information in Insight

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.



TAX-102* Energize PTMS: Optimal Value and Payment Workflows

Take PTMS beyond the return filing season, and start tracking your values and payments in PTMS. In this session, you will learn how to use the PTMS 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: Intermediate

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 for values and payments
- Enter assessment notice values
- Process tax bill payments

Day & Time:

Tuesday 2:45 p.m. – 4:00 p.m.

TAX-103* No Limits: Handle Complex Billing Jurisdictions and Returns in PTMS

Every year, certain states have us scratching our heads and searching our notes for reminders on how we handled that state last year. This session will bring clarity to the situation as it covers all of those fun, state-specific nuances in 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 – e.g., Texas, Louisiana, and Georgia
- Identify states that have exemptions – e.g., Michigan, Texas, and Indiana
- Assign reporting subjurisdictions to Michigan, Wisconsin, and Indiana
- Assign billing jurisdictions for Utah tax rates
- Organize data for billing in Texas and Michigan

Day & Time:

Monday 3:15 p.m. – 4:45 p.m.

TAX-104* Really Powerful: Using PTMS for Real Property **NEW**

You can use PTMS to manage your real property values, tax bills, and forecasts. Come to this session, and hear from existing users about how they use the specific features in PTMS for real property.

Track: PTMS - Tax

Session ID: TAX-104*

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:

- Understand the link between parcels, parcel components, and sites in PTMS
- Review the Assessment and Appeals Manager and learn the best way to view your real property information
- Know how the PTMS Options impact your results

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

TAX-200* Start Smart: Asset Movements and New Tax Years in PTMS

It is the dawn of a new tax year. You are eager to move forward with the wisdom and experience of the prior year and do not want to repeat any of its mistakes. This session will give you the skills you need to bring your data and property records into the new year and handle asset movements while minimizing the need to recreate data customizations from the previous year.

Track: PTMS - Tax

Session ID: TAX-200*

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
- Carryover prior-year data into the new tax year
- Evaluate strategies for populating the new tax year with prior-year property data
- Use PTMS to identify movements as well as inactive property, sites, and accounts
- Update new assets with data from their sites

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.

TAX-201* Lighting the Way: PTMS Assessment Classifications to Tax Forms and Values

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, and 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 generating complex tax forms
- Create exceptions to the default classifications rules
- Analyze the results and learn how to troubleshoot classifications

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.

TAX-203 Illuminating PTMS Value and Tax Allocations

If you have ever wondered where a number in PTMS came from, come to this session and shine a light on how PTMS calculates values and the related reported cost. You will also discover how PTMS allocates amounts from assessment notices and tax bills to individual property records. In addition, you will learn the importance of understanding how PTMS performs these calculations.

Track: PTMS - Tax

Session ID: TAX-203

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:

- Examine math calculations in PTMS – simple examples will cover the common PTMS processes for assets, inventory, and components
- Develop a better understanding of how PTMS allocates values
- Explore the PTMS Options that impact value and tax allocations for assets, inventory, and real property
- Examine the impact that cost and cost adjustments have on value allocations
- Review calculations that allocate value and tax to property
- Discuss different techniques to help you process values quickly and import values

Day & Time:

Tuesday 2:45 p.m. – 4:00 p.m.

TAX-204 Transform Your Value and Payment Processing with Document and Capture for PTMS

Reduce document handling time, reduce data entry from bills and assessments, and have instant access to all your property tax documents from PTMS with Capture and Document for PTMS. During the session, you will explore accessing Documents through PTMS, scanning and validating assessment notices and tax bills using Capture, importing tax bills and assessment notices into PTMS, generating returns to Document, and implementing Document and Capture.

Track: PTMS - Tax

Session ID: TAX-204

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:

- Open PDF copies of returns, notices, bills, and other attachments within PTMS
- Submit scans through Capture Front Office
- Validate the accuracy of scanned documents prior to creating import files with Capture Validation
- Import tax bills and assessment notices into PTMS from scans
- Access and maintain documents in single point web-based system
- Understand the Capture implementation process
- Troubleshoot common first year issues when using Capture

Day & Time:

Tuesday 9:15 a.m. – 10:30 a.m.

TAX-205* Charge into the Future: 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 to help you determine which module best meets the needs of your organization.

Track: PTMS - Tax

Session ID: TAX-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:

- Understand the requirements for creating forecasts and advanced estimates in PTMS
- Create forecasts and advanced estimates in PTMS
- Discuss the advantages of each module
- Understand why creating a forecast or advanced estimate calculation for the same property might provide different results and why both answers are correct
- Learn the terminology of forecasting and estimates
- Review the "Best Known Value" for property records and learn how it is calculated

Day & Time:

Tuesday 10:45 a.m. – 12:00 p.m.



TAX-206 Feel the Power of Appeals: AppealTrack Overview

AppealTrack allows you to track appeal-related tasks and requirements, generate appeal forms, centralize appeal documentation, minimize tax liability, maximize tax savings, and easily track your real property portfolio. It can also help you manage third-party consultants, track negotiations with jurisdictions, pay tax bills, and issue check requests. AppealTrack does all of this within a completely web-based platform designed for use by both consultant and corporate users alike. Join this lecture session, and see everything AppealTrack can do!

Track: PTMS - Tax

Session ID: TAX-206

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 functionality 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
- Assign third-party consultants to property
- Define user access rights

Day & Time:

Monday 3:15 p.m. – 4:45 p.m.

TAX-207 PTMS Optimizations: Turbocharge Your Tax Compliance

Do you ever wonder how other companies run their tax departments? Wish you could ask them about their experiences or the benefits of using a consultant? If so, join us as Erin O'Neal of Amazon shares his insights.

Track: PTMS - Tax

Session ID: TAX-207

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 Amazon's approach to developing their tax team
- Learn about Amazon's experiences with consultants
- Review the changes Amazon made to better utilize PTMS for their needs
- Have an opportunity to ask questions

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.



TAX-210 More Power, Less Stress: Add-ons for PTMS **NEW**

Bring your use of PTMS up to the next level by exploring all that the PTMS suite of products has to offer. This session will include an overview of how Office for PTMS seamlessly integrates your spreadsheets with PTMS without requiring an import, how Insight for PTMS brings task management and reporting to new heights, and how Document for PTMS can transform your access to property tax documents.

Track: PTMS - Tax

Session ID: TAX-210

Duration: 1 hr 15 min

CPE Credit: 1.5

Hands-on: No

Session Level: Intermediate

Subject Area: Specialized Knowledge & Applications

Prerequisite: None

Advanced Preparation: None

Session Objectives:

- Link Excel spreadsheets to automatically update value records within PTMS through Office for PTMS
- Populate spreadsheets with PTMS data automatically by using Office for PTMS
- Track upcoming property tax tasks by user with Insight for PTMS
- Generate email alerts through Insight for PTMS
- Explore executive reports and queries using Insight for PTMS
- Remotely approve returns, tax bills, and check requests with the Insight for PTMS app or web portal
- Attach and retrieve electronic documents using PTMS
- Access property tax documents in the cloud without PTMS

Day & Time:

Tuesday 1:15 p.m. – 2:30 p.m.

TAX-302* Advanced Intel on PTMS Payments

Have you ever wondered how to manage those Texas billing jurisdictions? Or, how to exclude property from a bill? If so, 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-203, or equivalent experience

Advanced Preparation: None

Session Objectives:

- Summarize payment processing for bills with 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:

Monday 3:15 p.m. – 4:45 p.m.



SME-001 Straight from the Top: Lessons from a Tax Assessor **NEW**

One of the most important relationships you have during filing season is with the assessor. You rely on them for answers to your questions, and they rely on you for timely and accurate returns. This session will give you the opportunity to learn ways to establish and maintain a successful relationship with the assessor's office.

Supervising Auditor-Appraiser, Peter van der Pas, from the Santa Clara County Assessor's Office, will share valuation techniques and other tips for your success!

Track: PTMS - Tax

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:

- Expand your awareness of best practices offered by the assessor's office.
- Identify time-saving opportunities in return processing.
- Discover calculation methods and alternate value techniques for completing accurate tax returns.

Day & Time:

Monday 8:45 a.m. – 10:15 a.m.

SME-002 Straight from the Top: PTMS Leasing Experts **NEW**

This session will focus on some of the challenges for lessors, not the least of which is the volume of data. Part of the session will be a panel discussion with your peers. From before lease inception through lease termination, PTMS can accommodate your needs. Come learn tips for not only importing leased property, but also how to ensure accurate property information, reporting, billing, and bill backs by streamlining many processes.

Track: PTMS - Tax

Session ID: SME-002

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:

- Evaluate if you are using the available technology effectively
- Determine if there are process improvements you could make
- Discuss what you can control about the total amount of property tax liability that hits your company's bottom line
- Spend time learning from other lessors

Day & Time:

Monday 1:30 p.m. – 3:00 p.m.