CSC

2024 Education Schedule

for CSC AppealTrack® and CSC PTMS®

Contents

Product Training Information

CSC offers a wide selection of courses for both the new and advanced users, most of which are eligible for CPE credit. All sessions are taught by experienced trainers and are designed to help address real-life issues through case studies and hands-on exercises.

We offer many convenient learning options to help address your learning needs on your terms:
- **Webcasts.** View free live webcasts or our library of on-demand webcasts over hot topics. The webcasts are designed to help you learn and work more efficiently.
- **Online Training.** Online instructor-led sessions provide detailed learning on specific subjects without having to leave your office.
- **Self-Study.** Online product training courses that are available on demand from our recording library, including interactive videos.
- **Classroom Training.** Immerse yourself in instructor-led sessions. Sessions are limited to a small number of participants to allow for individual instruction and knowledge-sharing. Visit our primary locations in the Chicago area, Dallas/Fort Worth area, or San Diego.
- **Onsite Training.** Experienced members of our training team will travel to your office and deliver a comprehensive training agenda designed to your specifications. Complete the onsite request form for more information.
- **Conference.** Attend CONNECT for networking and learning about all things CSC.

Training Locations

Chicago Area	Dallas/Fort Worth (DFW) Area	San Diego, CA
2100 E. Lake Cook Road	4400 State Highway 121	13500 Evening Creek Dr. N
Suite 800	Suite 500	Suite 500
Buffalo Grove, IL 60089	Lewisville, TX 75056	San Diego, CA 92128
847.236.8000	972.677.4200	858.547.4100

All online courses and classroom sessions in the Dallas/Fort Worth and Chicago areas are listed in Central Time (CT). San Diego, CA classroom sessions are in Pacific Time (PT).

Continuous Education Subscription

One low price for a Continuous Education Subscription (CES) entitles you and your entire team to take advantage of continuous learning on CSC LicenseHQ®, CSC License Pro®, PTMS, and AppealTrack. The CES provides access to many online and classroom training sessions* for all licensed users at your company.

Note: Courses in this schedule that are included with the Continuous Education Subscription include the following indicator: **CES**

Session topics span the LicenseHQ, LicensePro, PTMS, and AppealTrack products. Each session outlines learning objectives to improve your product usage and efficiency. With more than 100 sessions to choose from, you will find the right course for your business needs. Online sessions include self-study and live-instructor options. Classroom sessions offer hands-on learning and take place in our Chicago, Dallas/Fort Worth, or San Diego locations. Access is easy—just log in to CSC Connections and select the session of your choice from the **Learn** area. The subscription pricing activates when you log in. Your subscription term mirrors your product renewal cycle, streamlining the approval process.

Contact your Account Manager or CRM today and get all the details on this great opportunity for your company.

CPE Information

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits will be granted based on a 50-minute hour. CPE is available for most live training sessions, but please check the training details in the Education Schedule for the official amount of CPE credits for each session.

Corptax, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

NASBA National Registry of CPE Sponsors – Sponsor License Number 108611
Texas State Board of Public Accountancy – Sponsor Number 009498

In accordance with the National Association of State Boards of Accountancy (NASBA) standards, course evaluations will be distributed at the end of the event.

Registration Information

A full listing of course offerings is available by visiting **CSC Connections**. Please review the training details, including descriptions, price, and available CPE credits, for a course by browsing from the list of upcoming sessions or typing in the name of the course in the **Search** field.

To register, you must complete the online registration form including the payment processing:

1. Log in to **Connections**.
2. Click **Learn**, **Learn Home**.
3. Explore training opportunities by course type or product.
4. Locate the desired course and click **Register**.
5. Select **Complete Registration Now** or **Add to Cart and Complete Registration Later** to continue shopping and checkout via the cart when ready. **Note:** Your spot in a class is not reserved until you complete the checkout process.
6. Verify the class and price.
    - If you have a discount code, enter it into the **Discount Code** field and click **Apply Discount**.
    - If you have a training subscription, the price reflects what is included in your subscription.
7. Enter your payment information and click **Place My Order**.
8. Click **Printable Receipt** on the Registration Complete page to print your receipt. You can also access course information and handouts from this page.
9. Click **View Product** to access course information and handouts from this page.
10. Click **My Learning** to access your registered courses.

Session Materials for Classroom, Regional, and Onsite Training

Each training laptop (if applicable) has electronic materials loaded, and you can download materials prior to the session date.

To purchase a printed copy of session materials, you must place an order two weeks prior to the session date for which you are registered. The shipped orders go directly to the address provided in the request. No printed copies are available the day of the session. You can also purchase materials for a session that you are not attending. You will be invoiced for the purchase. CSC classroom session materials are $30 per book or downloadable file. Free shipping for all printed books. No refunds on purchased material.

To place an order for a printed copy of session materials:

1. Log in to **Connections**.
2. Submit a support case and include the session title, session date, and shipping address in the case details.

Cancellation Policy

- Cancellations up to three days prior to a scheduled classroom session will result in a $400 withdrawal fee per registrant.
- Cancellations up to three days prior to a scheduled online session will result in a $50 withdrawal fee per registrant.
- Cancellations within three days of any session and no-shows will be charged the full session fee.

We reserve the right to change the session fee and modify, reschedule, or cancel sessions at any time prior to the session start time. If we cancel a classroom session for which you are registered, you will receive a cancellation email three weeks prior to the session. If we cancel an online session for which you are registered, you will receive a cancellation email one week prior to the session.

To cancel your session for either a Classroom or Online session:

1. Log in to **Connections**.
2. Create a case and select **Training** as the Product. Include the session date and title in the case details.

Additional Information

Please contact us at **education@corptax.com** for more information regarding course content, delivery methods, or CPE; to inquire about our refund and cancellation policy; or to log a complaint regarding a session.

Alphabetical Listing of Courses

Throughout this schedule, you can view courses based on their product or product area. Use this list to locate courses based on their name or type. Click a course name below to view full course details.

Types

O Online Training Course

CES Continuous Education Subscription Eligible

C Classroom Training Course

Course	Types		
	O	C	CES
Advanced Estimating Module for PTMS	●		●
AppealTrack for the New User		●	●
AppealTrack for the New User 2-Day		●	●
AppealTrack New User Series	●		●
AppealTrack Jumpstart	●		●
Beyond the Basics for PTMS	●	●	●
Capture for PTMS for the New User	●	●	●
Communication and Collaboration in AppealTrack	●		●
Complex Payments in PTMS	●		●
Comprehensive Reporting in PTMS	●		●
Custom Training for the Advanced AppealTrack User	●	●	
Custom Training for the Advanced PTMS User	●	●	
Forecasting Taxes in PTMS	●		●
Getting Real: Managing Your Real Property in PTMS (NEW)	●		●
Importing Data into PTMS	●		●
Insight for PTMS for the New User	●		●
Managing Values in AppealTrack	●		●
Mastering Assessment Classifications in PTMS	●		●
Processing Payments in AppealTrack	●		●
Processing Payments in PTMS	●		●
PTMS: Advanced Tips and Tricks		●	●
PTMS for the New User 2-Day		●	●
PTMS for the New User 3-Day		●	●
PTMS New User Series - Part 1: Tax Return Cycle	●		●
PTMS New User Series - Part 2: Working with Assessed Values and Processing Payments	●		●
PTMS: Real Estate		●	●
Reporting Tools in AppealTrack	●		●
Revisit the Return Cycle in PTMS	●	●	●
The New Tax Year in PTMS	●		●
Valuing Your Property with PTMS	●		●

AppealTrack Courses

AppealTrack New User Series

O **CES**

Get users up and running with AppealTrack basics. This session demonstrates how to use the generate appeal forms, centralize documentation, maximize tax savings and easily track your real property portfolio. Practice creating and generating reports, manage activities and attachments to ensure strong communication across your team.

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic

Course Number: 06-A1101
Prerequisite: None
Advanced Prep: None

Price: $600
Duration: 6 hours

Course Dates:
- January 16/18
- April 16/18

Individual Modules—Day 1

Course Number:
06-A1101-1
Course Time:
10:00 AM–1:00 PM CT
CPE: 3

Managing Data and Creating Appeals: Build a strong understanding of data management within AppealTrack. Practice creating and updating property and parcel records, track important deadlines and manage your appeal workflow processes easily.

Objectives:
- Navigate AppealTrack
- Review Dashboard and filters
- Create and update company account profiles, property records, and parcel information
- Manage appeals and generate appeal forms
- Attach electronic documents
- Manage the Events Calendar and Outlook integration workflow

Individual Modules—Day 2

Course Number:
06-A1101-2
Course Time:
10:00 AM–1:00 PM CT
CPE: 3

Communication and Collaboration: This session will provide you with tools, tips, and best practices so you can take advantage of AppealTrack's time-saving features! Practice creating and sending custom automated reports, managing your workflow processes in batch, and tailoring AppealTrack to your specific needs.

Objectives:
- Use batch features to quickly update records
- Generate customer invoices
- Create custom merge documents
- Request electronic files with automated features
- Discover standard reports and how to build a custom report
- Create client dashboards and grant portal access
- Review company settings and other customizations

AppealTrack for the New User

`C` **CES**

Get users up and running with AppealTrack basics. This session demonstrates how to use the Generate Appeal forms, centralize documentation, maximize tax savings, and easily track your real property portfolio. Practice creating and generating reports, and manage activities and attachments to ensure strong communication across your team.

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
- Discover standard reports and how to build a custom report
- Manage the Events Calendar and Outlook integration workflow
- Create client dashboards

Delivery Method: Classroom
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 03-A1000-1

Prerequisite: None
Advanced Prep: None
CPE: 7.5
Price: $695
Duration: 1 day

Course Dates for Chicago, IL Area:
- February 23
- August 13

Course Time:

8:30 AM–4:30 PM CT

AppealTrack for the New User 2-Day

`C` **CES**

Get users up and running with AppealTrack basics. This session demonstrates how to use the Generate Appeal forms, centralize documentation, maximize tax savings, and easily track your real property portfolio. Practice creating and generating reports, and manage activities and attachments to ensure strong communication across your team.

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
- Discover standard reports and how to build a custom report
- Manage the Events Calendar and Outlook integration workflow
- Create client dashboards

Delivery Method: Classroom
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 03-A1000-2

Prerequisite: None
Advanced Prep: None
CPE: 15.5
Price: $1095
Duration: 2 days

Course Dates: Check back for future dates

Custom Training for the Advanced AppealTrack User

O C

Online Course

Optimize your use of AppealTrack with advanced training. Design your own course curriculum to gain expertise and utilize AppealTrack to best suit your business needs.

Sample topics:
- Reports
- Best Practices
- Data Cleanup (Inactivating Data)
- Manage Dashboard Workflows
- Optimizing Setup Options

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-A2000

Prerequisite: None
Advanced Prep: None
CPE: TBD
Price: TBD
Duration: Varies

Course Dates: Sessions are available on request.

Classroom Course

Optimize your use of AppealTrack with advanced training. Design your own course curriculum to gain expertise and utilize AppealTrack to best suit your business needs.

Sample topics:
- Reports
- Best Practices
- Data Cleanup (Inactivating Data)
- Manage Dashboard Workflows
- Optimize Setup Options

Delivery Method: Classroom
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 03-A2000

Prerequisite: None
Advanced Prep: None
CPE: TBD
Price: TBD
Duration: Varies

Course Dates: Sessions are available on request.

AppealTrack Jumpstart

O **CES**

Get new users up and running fast with AppealTrack. This onboarding session demonstrates how to generate appeal forms, centralize documentation, maximize tax savings, and easily track your real property portfolio.

Objectives:
- Navigate AppealTrack
- Use the Dashboard to manage deadlines
- Create and update company profiles, property records, and parcel information
- Manage appeals and generate appeal forms
- Use batch functionality to quickly update records
- Generate customer invoices

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-A1100

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates: Sessions are available on request.

Communication and Collaboration in AppealTrack

O **CES**

Ensure strong communication across your team within AppealTrack. Practice creating and generating reports, manage activities and attachments, create custom merge letters, and more!

Objectives:
- Create custom merge documents
- Attach electronic documents
- Manage the events calendar and Outlook integration workflow
- Build standard reports and learn how to build a custom report
- Create client dashboards and grant portal access
- Define company setup options

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-A1200

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates: Sessions are available on request.

Managing Values in AppealTrack

O **CES**

Appeal values and parcel values -- two great values that work great together. Join this session to learn the best way to manage values in AppealTrack and get the results you want.

Objectives:
- Understand the difference between appeal values and parcel values and how to best use each one
- See how both value types are related
- Review how to enter values through import and batch updates
- Manually enter values
- Create personalized value reports

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-A4300

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- March 6
- June 12

Course Time:
12:00 PM–2:00 PM CT

Processing Payments in AppealTrack

O **CES**

You're in the home stretch! Complete the appeal life cycle by processing payments in AppealTrack and reduce your risk of missing bills, overpayments, and penalties.

Objectives:

- Manage parcel values
- Determine requirements for processing payments
- Identify and learn the differences between Actual and Preliminary Bills
- Process tax bills and review the tax bill installment approval process
- Create and approve check requests (if applicable)
- Export payment data to Accounts Payable (if applicable)
- Manage payment related activities

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-A4400

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates: Sessions are available on request.

Reporting Tools in AppealTrack

O **CES**

Get the reports you want, exactly the way you need them to best communicate with your team. Effectively manage your data using both AppealTrack and Excel.

Objectives:
- Understand how to generate standard AppealTrack reports for client management, finance, analysis, and more
- See how to design custom reports tailored to meet specific needs
- Analyze your raw AppealTrack data using pivot tables and other advanced Excel features

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-A4600

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- March 13
- June 26

Course Time:
12:00 PM–2:00 PM CT

PTMS Courses

PTMS New User Series - Part 1: Tax Return Cycle

O **CES**

Get new users up and running fast with generating tax returns in this three-day online course. Review PTMS navigation and walk through importing data and filing returns. Practice the first steps of the return lifecycle with your own data and have the confidence to hit the ground running.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic

Course Number:
06-P1010
Prerequisite: None
Advanced Prep: None

Price: $900
Duration: 10.5 hours

Course Dates:
- January 8-10
- January 22-24
- February 5-7
- February 19-21
- March 4-6
- March 18-20
- April 8-10
- April 22-24
- May 6-8
- June 3-5
- July 8-10

Individual Modules—Day 1

Course Number:
06-P1010-1
Course Time:
10:00 AM–1:30 PM CT
CPE: 3.5

Preliminary Setup for Returns, Importing and Managing Data: This session introduces you to PTMS and walks you through basic navigation, importing and preparing data for property tax returns.

Objectives:
- Navigate PTMS
- Determine preliminary setup requirements for filing returns
- Import and prepare data to successfully flow to tax returns

Individual Modules—Day 2

Course Number:
06-P1010-2
Course Time:
10:00 AM–1:30 PM CT
CPE: 3.5

Managing Assessment Classifications and Generating Returns: This session focuses on the next steps of the return lifecycle by mapping your property to the correct area of the return, calculating property values and generating tax returns and attachments.

Objectives:
- Customize and apply Assessment Classifications
- Prepare data to successfully flow to tax returns
- Generate tax returns forms for at least 2 states

Individual Modules—Day 3

Course Number:
06-P1010-3
Course Time:
10:00 AM–1:30 PM CT
CPE: 3.5

System Setup, Customization and Security: Discover how to customize and set up your PTMS system to streamline commonly used functions.

Objectives:
- Manage supporting data in PTMS including Jurisdiction Manager and Accounts
- Review company system options and user security roles
- Confirm set up and customize grids and other data fields in your live environment

PTMS Courses

PTMS New User Series - Part 2: Working with Assessed Values and Processing Payments

O **CES**

Now that you are comfortable with the returns process, complete the tax lifecycle by tracking assessment notices and processing payments.

Objectives:

- Enter assessment notice information and compare values
- Determine requirements for processing payments
- Process tax bill using standard and quick entry methods
- Utilize the tax calendar for efficient workflows and data population

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P1020
Prerequisite: None

Advanced Prep: None
CPE: 3.5
Price: $300
Duration: 3.5 hours

Course Dates:
- January 12
- January 26
- February 9
- February 23
- March 22
- April 12
- April 26
- May 10
- June 7
- July 12

Course Time:
10:00 AM–1:30 PM CT

PTMS for the New User 3-Day

C CES

Get new users up and running fast with this three-day course. Review PTMS navigation and walk through filing returns and paying tax bills. Practice the return lifecycle with your own data and return home with the confidence to hit the ground running.

Objectives:
- Import and prepare data to successfully flow to tax returns
- Prepare tax returns forms for at least two states
- Enter assessment notice information and compare values
- Determine requirements for processing payments
- Process tax bill using standard and quick entry methods
- Manage supporting data in PTMS including Jurisdiction Manager and Accounts
- Use the tax calendar for efficient workflows and data population

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-P1000-1
Prerequisite: None

Advanced Prep: None
CPE: 23.5
Price: $1,495
Duration: 3 days

Course Dates for Dallas, TX:
- January 23-25
- March 19-21
- July 23-25
- September 24-26

Course Time:
- Day 1: 8:30 AM–4:30 PM PT
- Day 2: 8:30 AM–4:30 PM PT
- Day 3: 8:30 AM–4:30 PM PT

Course Dates for Chicago, IL Area:
- February 20-22
- August 14-16

Course Time:
- Day 1: 8:30 AM–4:30 PM PT
- Day 2: 8:30 AM–4:30 PM PT
- Day 3: 8:30 AM–4:30 PM PT

PTMS for the New User 2-Day

C CES

Get new users up and running fast with this two-day course. Review PTMS navigation and walk through filing returns and paying tax bills. Practice the return lifecycle with your own data and return home with the confidence to hit the ground running.

Objectives:
- Import and prepare data to successfully flow to tax returns
- Prepare tax returns forms for at least two states
- Enter assessment notice information and compare values
- Determine requirements for processing payments
- Process tax bills using standard and quick entry methods
- Manage supporting data in PTMS including Jurisdiction Manager and Accounts
- Use the tax calendar for efficient workflows and data population

Delivery Method: Classroom
Subject Area: Taxes
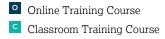**Course Level:** Basic
Course Number: 03-P1000-2
Prerequisite: None

Advanced Prep: None
CPE: 15.5
Price: $1,095
Duration: 2 days

Course Dates: Check back for future dates

O Online Training Course
C Classroom Training Course
CES Continuous Education Subscription Eligible

The New Tax Year in PTMS

O **CES**

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.

Objectives:
- Create a new year in PTMS
- Carry over 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

Delivery Method: Online
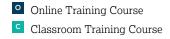**Subject Area:** Taxes
Course Level: Intermediate
Course Number: 06-P4000
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- January 5

Course Time:
12:00 PM–2:00 PM CT

Custom Training for the Advanced PTMS User

`O` `C`

Online Course

Optimize your use of PTMS with advanced training. Design your own course curriculum to gain expertise and use PTMS to best suit your business needs.

Sample topics:
- Reports
- Best practices
- Data cleanup (inactivating data)
- Optimizing setup options
- Add-on products (Insight for PTMS, Capture for PTMS)

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-P2000
Prerequisite: None

Advanced Prep: None
CPE: TBD
Price: TBD
Duration: Varies

Course Dates:
Sessions are available on request.

Classroom Course

Optimize your use of PTMS with advanced training. Design your own course curriculum to gain expertise and use PTMS to best suit your business needs.

Sample topics:
- Reports
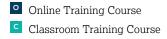- Best practices
- Data cleanup (inactivating data)
- Optimizing setup options
- Add-on products (Insight for PTMS, Capture for PTMS)

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: 03-P2000
Prerequisite: None

Advanced Prep: None
CPE: TBD
Price: TBD
Duration: Varies

Course Dates:
Sessions are available on request.

Revisit the Return Cycle in PTMS

O **C** **CES**

Online Series

When it comes to filing returns, the goalposts are always moving – changing rates, form updates, shifting statutes and requirements—with every new tax year come fresh challenges. It's time to become an expert at handling challenging states with more complex scenarios.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P4205
Prerequisite: None

Advanced Prep: None
Price: $400
Duration: 4 hours
Course Dates:
- February 26

Individual Modules—Day 1

Module #1
Course Number: 06-P4205-1
Course Time: 10:00 AM–12:00 PM CT
CPE: 2

This session focuses on the initial steps of the return lifecycle by reviewing your property post import, mapping the property to the correct area of the return, and calculating property values.

Objectives:
- Review basic return setup and options
- Determine requirements for complex filing states
- Review data imports and prepare date for tax return forms

Module #2
Course Number: 06-P4205-2
Course Time: 2:00 PM–4:00 PM CT
CPE: 2

This session focuses on the next steps of the return process with generating tax returns and attachments.

Objectives:
- Set up return attachments and e-filing configurations
- Generate tax return forms for at least two states
- Manage multiple years of data on a return form

Classroom Course

When it comes to filing returns, the goalposts are always moving—changing rates, form updates, shifting statutes and requirements—with every new tax year come fresh challenges. It's time to become an expert in challenging states with more complex scenarios.

Objectives:
- Review basic return setup and options
- Determine requirements for complex filing states
- Set up return attachments and e-filing configurations
- Import and prepare data for tax return forms
- Generate tax return forms for at least two states
- Manage multiple years of data on a return form

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: 03-P4200
Prerequisite: None

Advanced Prep: None
CPE: 7.5
Price: $695
Duration: 1 day

Course Dates: Check back for future dates

Capture for PTMS for the New User

O C CES

Online Series

Did you recently purchase Capture for PTMS, or did you join a new team that uses Capture? Practice scanning and validating assessment notices and tax bills, access documents through PTMS, import tax bills and assessment notices into PTMS, and generate and save returns to Document for PTMS.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-P4700
Prerequisite: None
Advanced Prep: None
Price: $400
Duration: 4 hours
Course Dates: Sessions are available on request.

Individual Modules—Day 1

Module #1: Navigation and Managing Documents
Course Number: 06-P4700-1
Course Time: 10:00 AM-12:00 PM
CPE: 2

Review requirements for uploading scanned documents to Capture Front Office and validating data for accuracy before importing into PTMS.

Objectives:
- Assess and complete setup requirements
- Submit scans through Capture Front Office
- Validate accuracy of scanned documents prior to creating files

Module #2: Imports of Assessment Notices and Tax Bills
Course Number: 06-P4700-2
Course Time: 2:00 PM-4:00 PM
CPE: 2

This session focuses on the next steps of the scanned document process by importing assessment notice and tax bill data into PTMS.

Objectives:
- Import files from scans with no data entry
- Access and maintain documents in a single-point, web-based system
- Open *.pdf* images of returns, notices, bills, and other attachments within PTMS
- Solve common troubleshooting issues

Classroom Course

Did you recently purchase Capture for PTMS, or did you join a new team that uses Capture? Practice scanning and validating assessment notices and tax bills, access documents through PTMS, import tax bills and assessment notices into PTMS, and generate returns to Document for PTMS.

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

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: 03-P4700
Prerequisite: None
Advanced Prep: None
CPE: 7.5
Price: $695
Duration: 1 day

Course Dates: Check back for future dates

Insight for PTMS for the New User

O **C** **CES**

Online Series

Get the most out of dashboards, workflows, and reports with Insight for PTMS. Track important dates, generate report queries, and customize Insight for your company's workflow.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-P4900
Prerequisite: None

Advanced Prep: None
Price: $400
Duration: 4 hours
Course Dates: Sessions are available on request.

Module #1: Navigation, Setup and Customization
Course Number: 06-P4900-1
Course Time: 10:00 AM-12:00 PM
CPE: 2

Review requirements for generating report queries and customize Insight for PTMS based on your company's needs.

Objectives:
- Review underlying data requirements and best practices
- Optimize calendar setup for Insight
- Identify most valuable queries and their uses

Module #2: Report Queries and Subscriptions
Course Number: 06-P4900-2
Course Time: 2:00 PM-4:00 PM
CPE: 2

This session focuses on generating queries for tax returns, assessment notices, and payments. Set up email notifications for due dates, appeal deadlines, and more in Insight.

Objectives:
- Set up email notifications and task workflows
- Troubleshoot common issues
- Deploy mobile versions of Insight on your tablet or phone

Classroom Course

Get the most out of dashboards, workflows, and reports with Insight for PTMS. Track important dates, generate report queries, and customize Insight for your company's workflow.

Objectives:
- Review underlying data requirements and best practices
- Optimize calendar setup for Insight
- Identify most valuable queries and their uses
- Set up email notifications and task workflows
- Troubleshoot common issues
- Deploy mobile versions of Insight on your tablet or phone

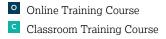**Delivery Method:** Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-P4900
Prerequisite: None

Advanced Prep: None
CPE: 4.5
Price: $400
Duration: 4 hours

Course Dates: Check back for future dates

Beyond the Basics for PTMS

`O` `C` `CES`

Online Series

You've been through basic training; now advance your mastery of PTMS beyond filing returns and paying bills, and maximize your tax compliance efficiency and expertise for years to come. This session uses lecture, demonstration, and hands-on practice to teach you how to master PTMS.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-P3100
Prerequisite: 06-P1101, 06-P1102, or equivalent experience
Advanced Prep: None

Price: $400
Duration: 4 hours
Course Dates:
- January 31
- May 1
- June 26

Module #1
Course Number: 06-P3100-1
Course Time: 10:00 AM–12:00 PM CT
CPE: 2

Prepare your system for the new year and ensure you are set up for success and ready to tackle the next tax cycle in PTMS. Review and clean up prior year data and update new year records accordingly. Handle asset movements with ease and minimize the need to recreate data customizations from the previous year.

Objectives:

- Create the new tax year in PTMS
- Carry over prior-year data into the new tax year
- Use PTMS to identify movements as well as inactive property, sites, and accounts
- Update new assets with data from their sites

Module #2
Course Number: 06-P3100-2
Course Time: 2:00 PM–4:00 PM CT
CPE: 2

Whether it came from the assessor, the accounting department, or any other source, there comes a time when a new value must be entered onto property records. Use the values from your property in PTMS to estimate tax liablity, for the current year or the future by creating forecasts.

Objectives:

- Enter and compare values
- Review the "Best Known Value" for property records and learn how it is calculated
- Uncover how PTMS uses values and tax rates to optimize your forecasts
- Explore the various settings and terminology for creating forecasts

Classroom Course

You've been through basic training; now advance your mastery of PTMS beyond filing returns and paying bills, and maximize your tax compliance efficiency and expertise for years to come. This session uses lecture, demonstration, and hands-on practice to teach you how to master PTMS. This session offers the ability to use your own data if available.

Objectives:

- Maximize PTMS for your second tax year
- Review assessment classifications
- Manage asset valuations to minimize taxes
- Determine requirements for complex billing states
- Create forecasts to project property taxes
- Use the tax calendar for efficient workflows and data population
- Discover tips and tricks to optimize your PTMS experience

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Advanced
Course Number: 03-P3100
Advanced Prep: None
Duration: 1 day

Course Dates: Check back for future dates

Prerequisite: 3-P1000-1, 3-P1000-2, or equivalent experience
CPE: 7.5
Price: $695

PTMS: Real Estate

C **CES**

Learn the fundamentals of PTMS for Real Estate. This course uses lecture, demonstration, and hands-on practice to teach you how to use PTMS.

Objectives:
- Store and track parcel information
- Create and assign accounts
- Enter assessment notices and compare values
- Process payments and check requests for real estate
- Review and create grid configurations
- Make use of the Reports Manager

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-P4100
Advanced Prep: None

Prerequisite: None
CPE: 15.5
Price: $1,095
Duration: 2 days

Course Dates: Check back for future dates

Advanced Estimating Module for PTMS

O **CES**

This course uses lecture, demonstration and hands-on practice for learning how to use the Advanced Estimating Module in PTMS. You will customize PTMS and generate Advanced Estimates to predict taxes into future years. Whether you are anticipating the tax obligations of existing or potential clients, the Advanced Estimating Module can see the future of your (or your clients') tax liability obligations.

This training uses customer data or a PTMS training dataset.

Objectives:
- Set up and customize your PTMS system for optimal creation of Advanced Estimates
- Creation of Advanced Estimates in your PTMS system
- Appraisal of leasing and sales conditions that warrant differing scenarios
- Analysis of the terminology of Advanced Estimates
- Review the "Best Known Value" for property records and learn how it is calculated
- Creation of Advanced Estimates for assets that do not exist in PTMS

Delivery Method: Online
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-P3200
Prerequisite: None

Advanced Prep: None
CPE: 2
Price: $200
Duration: 2 hours

Course Dates: Sessions are available on request.

PTMS: Advanced Tips and Tricks

C **CES**

This course uses lecture, demonstration, and hands-on practice to teach you how to master PTMS. This session offers the ability to utilize your own client data, if available.

Objectives:
- Maximize PTMS for your second tax year
- Manage asset valuations to minimize taxes
- Project property taxes by creating forecasts
- Utilize the tax calendar for efficient workflows and data population
- Manage important deadlines with Insight for PTMS
- Discover tips and tricks to optimize your PTMS experience

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Advanced
Course Number: 03-P3000
Prerequisite: None

Advanced Prep: None
CPE: 7.5
Price: $695
Duration: 1 day

Course Dates: Check back for future dates

Mastering Assessment Classifications in PTMS

O **CES**

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.

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

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P4100
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- January 3
- March 13

Course Time:
12:00 PM–2:00 PM CT

Valuing Your Property with PTMS

O **CES**

Avoid being overassessed by tracking values in PTMS. Run multi-year comparisons to anticipate market trends, manage abatements and exemptions, and more accurately project future tax.

Objectives:
- Use the Property Manager and Assessment and Appeals Manager to easily compare, manage, and report values
- Flag values that exceed thresholds as part of an integrated approval workflow
- Generate reports that identify value trends
- 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

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P4300
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- May 15

Course Time:
12:00 PM–2:00 PM CT

Processing Payments in PTMS

O **CES**

You're in the home stretch! Complete the tax life cycle by processing payments in PTMS and reduce your risk of missing bills, overpayments, and penalties.

Objectives:
- Identify and learn each method of processing tax bills
- Review the tax bill approval process and export to AR
- Create Check Requests
- Approve Check Requests
- Create an Advanced AP Export and discover how Anybill integrates with PTMS
- Determine underlying data requirements and setup options

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P4400
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- May 29

Course Time:
12:00 PM–2:00 PM CT

Complex Payments in PTMS

O **CES**

Move beyond basic bill processing and learn to tackle complex billing scenarios and payment exceptions. Create reports to spotlight missing bills and track payments through the payment life cycle.

Objectives:
- Assign jurisdictions for Michigan and Texas payments
- Exclude property from a bill
- Review the Advanced AP Export
- Configure three payment reports

Delivery Method: Online
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-P4450
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- July 18

Course Time:
12:00 PM–2:00 PM CT

Importing Data into PTMS

O **CES**

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.

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

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P4500
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- January 19

Course Time:
12:00 PM–2:00 PM CT

Comprehensive Reporting in PTMS

O **CES**

You 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.

Objectives:
- Review reports available
- Discover the common tools for use with reports
- Ensure proper reporting of tax bill due dates
- Identify the PTMS data and fields that must be populated to generate a report
- Create and save report configurations for reuse
- Troubleshoot report data

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-P4600
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- April 17

Course Time:
12:00 PM–2:00 PM CT

Forecasting Taxes in PTMS

O **CES**

There is always a need to anticipate tax liability. Use the values from your property in PTMS to estimate taxes, for the current year or the future. This online course uses lecture, demonstration, and hands-on practice for learning how to use PTMS.

Objectives:
- Review the "Best Known Value" for property records and learn how it is calculated
- Uncover how PTMS uses values and tax rates to optimize your forecasts
- Explore the various settings and terminology for creating forecasts

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-P4625
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- April 3
- July 17

Course Time:
12:00 PM-2:00 PM CT

Getting Real: Managing Your Real Property in PTMS (NEW)

O **CES**

Get hands-on practice on how to use PTMS for Real Property including importing external data into PTMS, managing real estate information and asset valuations. You will be learning the basics of PTMS using a training dataset.

Objectives:
- Import and Review Real Estate Data
- Enter Assessment Notice Information and Compare Values
- Determine Requirements for Processing Payments
- Manage Supporting Real Property Data in PTMS including Accounts

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-P4650
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Price: $200
Duration: 2 hours

Course Dates:
- June 19

Course Time:
12:00 PM-2:00 PM CT

Self-Study Courses

To register for a Self-Study course, follow the steps in the *Registration Information* section on page 5. Once you register, you will have access to the recording and the corresponding session documents for 30 days.

To access the training:

1. Log in to Connections.
2. Hover over the **Learn** box and click **View All Training Opportunities**.
3. Click **My Learning**.
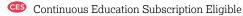4. Locate the session and click on the title link.

Self-Study courses are included in the Continuous Education Subscription. Click here for more information.

PTMS Self-Study Courses

Note: No CPE is available for PTMS Self-Study courses.

PTMS Course Details	Duration
Accruals for PTMS - Adjusting Accruals When you have updates to your data, e.g., new property, updated values, or a tax bill has been processed, you can adjust your accrual. Due to the many company-specific decisions needed for accurate accruals, please contact your Client Relationship Manager to schedule time with a CSC Consultant.	4 minutes
Accruals for PTMS - Creating an Accrual Setup completed? You're ready to create an Accrual in PTMS and project taxes. Due to the many company-specific decisions needed for accurate accruals, please contact your Client Relationship Manager to schedule time with a CSC Consultant.	5 minutes
Accruals for PTMS - Journal Entries After creating your accrual in PTMS, you can create journal entries and export them to your accounts payable department. Due to the many company specific decisions needed for accurate accruals, we require that you work with a CSC Consultant to ensure proper data setup. Please contact your Client Relationship Manager to schedule time with a CSC Consultant.	3 minutes
Accruals for PTMS - Preliminary Setup Preview the setup requirements to use the Accruals Manager. Still interested? Due to the many company-specific decisions needed for accurate accruals, please contact your Client Relationship Manager to schedule time with a CSC Consultant.	6 minutes
An Overview of Preparing Data for Returns in PTMS Whether you're learning tax return preparation in PTMS for the first time, or you just need a quick refresher, you'll appreciate this brief review of the modules used when preparing your data for tax returns.	5 minutes
An Overview of Preparing Tax Returns in PTMS Get your returns generated and correct with this high-level overview of preparing return forms in PTMS. This tutorial includes the use of resources that can help you with your own questions regarding preparing tax returns in PTMS.	5 minutes
An Overview of the PTMS Payment Manager Whether you're new to payments or haven't processed them in PTMS in a while, you'll be inspired to get your money moving to the right places after this brief overview.	5 minutes
An Overview of the PTMS Reports Manager This video walks you through the process of creating and generating reports in the Reports Manager. Explore the setup methods and best practices when preparing reports in PTMS.	6 minutes
Assessment Notice Imports in PTMS Use the import process in PTMS to add assessment notice values. The Assessment Notice import is also used with the PTMS companion product—Capture™ for PTMS.	5 minutes

Self-Study Courses

PTMS Course Details	Duration
Assigning Assessor Accounts in PTMS Many assessors require the use of account numbers for proper grouping of property records on tax returns. This tutorial will show you how to create and assign account numbers for your property records, and how to group or separate your property records by account number when generating tax returns in PTMS.	5 minutes
Assigning Billing Jurisdictions and Collector Accounts in PTMS Learning how to group or separate your property records when processing bills against them and specifying to whom payment should be sent are two crucial elements in the process of bill paying. This video stands alone as the single most useful video when preparing to process payments in PTMS.	5 minutes
Capture for PTMS - Front Office Capture™ for PTMS - Front Office is the first step in the digitized tax bill and assessment notice process. This module allows you to upload your previously scanned tax documents in preparation for validating and importing extracted data into PTMS.	8 minutes
Capture for PTMS - Validation Capture™ for PTMS - Validation is the second step in the digitized tax bill and assessment notice process. This module uses OCR (Optical Character Recognition) to extract data from your documents and then allows you to review the extracted data before importing into PTMS.	5 minutes
Document for PTMS Manage your paperwork from the property tax lifecycle electronically! If you license or are interested in licensing Document™ for PTMS, watch this video to tidy up your desk. *Note:* Document for PTMS is available as a single add-on module, but Capture for PTMS is available only when used in conjunction with Document for PTMS.	5 minutes
Entering Assessments in the PTMS Assessments and Appeals Manager Interested in tracking a little more information than the value from the assessor's assessment notice? Wondering if it's worth appealing the assessor's value? Both of those tasks can easily be managed in the Assessments & Appeals Manager. Find out how.	5 minutes
Forecasting Taxes in PTMS There is always a need to anticipate tax liability. Use the values from your property in PTMS to estimate taxes, for the current year or the future.	5 minutes
Importing Data into PTMS Learn how to import data into PTMS and discover tools that will help you review your data and ensure that you are set up to succeed.	5 minutes
Insight for PTMS: Email Notifications You've got mail! Set up email notifications for tax return due dates, tax bill due dates, appeal deadlines, and more in Insight.	5 minutes
Insight for PTMS: Overview Gain insight about your team and workload throughout the property tax lifecycle. If you license or are interested in licensing Insight for PTMS, watch this video to review the available tools.	5 minutes
Insight for PTMS: Setup Using Insight is like baking a cake: it requires several ingredients to get the best results. Review this video to set up Insight for accurate query results and email notifications.	5 minutes
Managing Assessment Classifications in PTMS Get your assets in the right place on the form, with the right values. You will learn how to direct your property records to any place on the form, and how to depreciate their values for proper reporting.	5 minutes
Managing Check Requests and AP Exports in PTMS Get those payments included onto check requests so that your tax bills get paid timely and efficiently.	5 minutes
Managing GL Accounts in PTMS Requests for payment reference accounts from which the funds are to be drawn. This video will help you link those accounts to your property that is included on your payments.	5 minutes

Self-Study Courses

PTMS Course Details	Duration
Managing the Tax Calendar in PTMS Discover the ins and outs of the PTMS Tax Calendar and see how important dates are tracked throughout the system. Calendar setup is required and used with the PTMS companion product—Insight™ for PTMS.	5 minutes
Navigating PTMS Learn how to effectively navigate the tabs, ribbons, and grids in PTMS. Configure paging preferences, learn to use quick find and apply the best filter methods available in PTMS.	5 minutes
Preliminary Setup for Payments in PTMS Begin your payments experience with a review of the settings and preferences in PTMS to ensure proper creation and processing of tax bills.	5 minutes
Preparing California 571-L SDR The California Standard Data Return (SDR) is a method of filing returns in many California counties via a true electronic file upload. Save time in printing and mailing and learn how file the California 571-L SDR electronically.	5 minutes
Preliminary Setup for Return Filing in PTMS Begin your filing season with a review of your company data and the settings in PTMS to ensure the proper generation of your tax return.	5 minutes
Preparing Tax Returns in PTMS New to the Returns Manager? Not for long! Five minutes from now, you'll be setting your preferences, deciding what to include (or exclude) on your returns, and generating your tax forms for review and submission.	5 minutes
Preparing the DC Personal Property Return Form FP-31 Discover the unique options for depreciating and filing property for the District of Columbia Personal Property Return Form FP-31.	5 minutes
Preparing the Georgia PT-50P Return Form Georgia return forms display prior year costs, additions and deletions,and inventory and freeport exemptions. Ensure your data flows to the form correctly by reviewing the additional set up requirements.	5 minutes
Preparing the Georgia PT-50PF Return Form This video walks you through the process of preparing the Georgia PT-50PF Freeport form.	5 minutes
Preparing the Indiana 103-Long Return Form Discover the setup needed to file the Indiana 103-Long return form. This video walks you through the steps of assigning subjurisdictions to sites and how to generate the form correctly.	5 minutes
Preparing the Indiana 103-ERA Return Form The Indiana 103-ERA may allow you to reduce your taxable value on manufacturing equipment. Learn the additional setup required to file this form successfully.	5 minutes
Preparing the Michigan 632 (L-4175) PP Statement Explore the setup methods and best practices of filing the Michigan 632 Personal Property Statement in PTMS.	5 minutes
Preparing the Michigan 5076 Exemption Affidavit If your total true cash value of all eligible industrial or commercial property within a tax-collecting unit is less than $80,000, you can file an exemption using the 5076 Affidavit. Learn the additional setup required to file this form annually.	5 minutes
Preparing the Michigan 5278 EMPP Return Form Michigan has introduced an exemption for manufacturing personal property. This training video walks through the steps of preparing site and asset data in order to populate and generate the form correctly.	5 minutes
Preparing the North Carolina Business Personal Property Forms This video walks you step by step through the process of preparing the North Carolina and Mecklenburg Business Personal Property forms in PTMS.	5 minutes
Preparing the Nevada Business Property Declarations Learn the ins and outs of filing the NV Business Property Declaration and Clark County Declaration.	5 minutes

Self-Study Courses

PTMS Course Details	Duration
Preparing the Oklahoma Form 901 The Oklahoma Form 901 displays prior year costs, additions and deletions, and inventory and freeport exemptions. Ensure your data flows to the form correctly by reviewing the additional setup requirements.	5 minutes
Preparing the South Carolina PT-100 Alternate Return Taxpayers who file 100 or more returns in a tax year are required to file their return electronically. Learn how to file the South Carolina PT-100 Alternate form electronically.	5 minutes
Preparing the Virginia 762 - Personal Property Return Many jurisdictions in Virginia have specific filing requirements, including which forms are accepted. Due to these restrictions, it is critical to review Returns Help prior to beginning your returns process. This video walks you through the steps of filing the Virginia 762 Personal Property Return form.	5 minutes
Processing Tax Bills in PTMS Learn the simple and effective process of creating payments in your PTMS system.	5 minutes
PTMS Return Resources Who couldn't use a little guidance in the PTMS Returns Manager? This session will explore some incredible resources that will ensure success with your tax return preparation.	5 minutes
PTMS Returns History and Status "Hey, where did my return go?" Once generated, your tax return should be saved onto the Returns History grid, for a re-telling of the exact settings when the return was generated, and for a status workflow of what to do next. This session will illustrate the advantages of using the Returns History tab.	5 minutes
Review and Assign Assessors in PTMS Ensure that your tax returns are being addressed and filed with the appropriate jurisdictions.	5 minutes
Security Setup in PTMS Ensure you have the best security model and practices in place with PTMS User Manager.	5 minutes
Sites On-The-Fly in PTMS If you are a leasing company or have property that is not at a physical location due to frequent asset movements, PTMS can create sites "on-the-fly" during an asset import.	5 minutes
The New Tax Year in PTMS Prepare your system for the new year and ensure you are set up for success and ready to tackle the next tax cycle in PTMS. Review and clean up prior year data and update new year records accordingly.	5 minutes
Tax Bill Imports in PTMS Use the import process in PTMS to create tax bills. The Tax Bill import is also used with the PTMS companion product—Capture™ for PTMS.	5 minutes
Tax Return Attachments and Reports in PTMS Want a list of your reported property included with your return? Wish you could suppress the form-generated list, so that you could provide your own? How about an electronic spreadsheet-generated property list for online submission? If you answered "Yes" to any of those questions, this is the tutorial for you!	5 minutes
Working with WALZ Certified Mailing Labels in PTMS Want to avoid manual entry for Certified Mailing labels? Watch this video and contact your Client Relationship Manager to create an account.	5 minutes
Working with Assessed Values in PTMS Whether it came from the assessor, the accounting department or any other source, there comes a time when a new value must be entered onto property records. If ever there was a mandatory PTMS training video, this should be it. This simple video on inputting values is full of useful information for any PTMS user.	5 minutes

Learning Paths

Take a look at the following Learning Paths to see the courses you should participate in to help you transition from a beginner to a more advanced user of each product.

Note: Some courses apply to more than one product area.

AppealTrack New User Learning Path

Title	Duration	Level
AppealTrack New User Series	1-2 Days	Basic
AppealTrack Jumpstart	2 Hours	Basic
Communication and Collaboration in AppealTrack	2 Hours	Basic
Managing Values in AppealTrack	2 Hours	Basic
Reporting Tools in AppealTrack	2 Hours	Basic
Processing Payments in AppealTrack	2 Hours	Basic
Custom Training for the Advanced AppealTrack User	TBD	Intermediate

PTMS New User Learning Path

Title	Duration	Level
PTMS New User Series - Part 1: Tax Return Cycle	2-3 Days	Basic
PTMS New User Series - Part 2: Working with Assessed Values and Processing Payments	3.5 Hours	Basic
Revisit the Return Cycle in PTMS	1 Day	Basic
The New Tax Year in PTMS	2 Hours	Intermediate
Mastering Assessment Classifications in PTMS	2 Hours	Basic
Valuing Your Property with PTMS	2 Hours	Basic
Processing Payments in PTMS	2 Hours	Basic
Importing Data into PTMS	2 Hours	Basic
PTMS: Real Estate	2 Days	Basic
Custom Training for the Advanced PTMS User	TBD	Intermediate

PTMS Experienced User Learning Path

Title	Duration	Level
Beyond the Basics for PTMS	1 Day	Advanced
Revisit the Return Cycle in PTMS	1 Day	Basic
The New Tax Year in PTMS	2 Hours	Intermediate
Mastering Assessment Classifications in PTMS	2 Hours	Basic
Valuing Your Property with PTMS	2 Hours	Basic
Processing Payments in PTMS	2 Hours	Basic
PTMS: Real Estate	2 Days	Basic
Complex Payments in PTMS	2 Hours	Advanced
Comprehensive Reporting in PTMS	2 Hours	Intermediate

Learning Paths

Title	Duration	Level
Forecasting Taxes in PTMS	2 Hours	Intermediate
PTMS: Advanced Tips and Tricks	1 Day	Advanced
Custom Training for the Advanced PTMS User	TBD	Intermediate

To access training courses, log in to **Connections** and click **Learn**, **Learn Home**.