

*Alabama Department of Revenue
Professional Education and Training
Program Manual*

Policy Manual

**State of Alabama Department of Revenue
Property Tax Division
Education and Certification Program Manual**

Effective: August 2023

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Professional Education and Training Program Manual

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Eligibility and Application Process for Candidacy to Program

0200-0299

State of Alabama Department of Revenue
Professional Education and Training Program Manual

Policy Number 0200

Subject Eligibility for Certification

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

The Department of Revenue Professional Education and Training Program is designed to enhance appraisal, mapping, and management skills so that participants may be certified by the State. Those eligible to achieve certification are the elected and appointed county property tax officials and staff, and the Property Tax Division staff of the Alabama Department of Revenue.

The program objectives are:

- To improve knowledge in the fields of appraising, mapping, and management
- To maintain high standards in property tax administration
- To increase professionalism in state and county property tax offices

These objectives will be fulfilled through four curricula leading to the designation of Alabama Certified Appraiser of Real Property, Alabama Certified Appraiser of Personal Property, Alabama Certified Tax Administrator, Alabama Certified Mapper. The Support Staff Development Program provides two levels of recognition for support staff members who have met education and experience requirements.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0201

Subject Eligibility for Application to Program

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

County employees seeking one of the designations are not required to complete a formal application process to enter the educational track of instruction. The candidate must be employed by the County through the duration of each course and at the time of the examination in order to receive the appropriate designation. No designations will be given after an employee has left the employ of the County.

Job title of candidates will not be considered in determining eligibility for candidacy. (*May 22, 1997*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0202

Subject Requirements to Apply for Certification

Page 1 of 2

Supersedes

Approval Date August 27, 2009 or earlier

Effective Date August 27, 2009 or earlier

Policy

1. A minimum of three years' experience in the field of designation choice is required while the official job title of candidates for designation will not be considered in determining eligibility for candidacy (*May 22, 1997*). Effective March 2003, all candidates must meet the three-year experience requirement in order to take the comprehensive exam. (*May 17, 2001*) Exam Applications must be signed by the Immediate Supervisor and the Elected Official. (*Nov. 14, 2006*) Candidates for a designation must be found by the Department of Revenue to have three years of qualifying experience, as of the application closing date, to include the performance of the full range of responsibilities in the discipline for which they are seeking designation.

Further clarification of experience requirements:

- In State experience will be reviewed on a case-by-case basis. The JEAC and the Department of Revenue will determine whether experience from outside of a State or County ad valorem office provides the candidate with the performance responsibilities in the discipline for which they are seeking designation. (*August 15, 2019*)
 - Out-of-State experience will be reviewed on a case-by-case basis. Out-of-State experience of three years or more will equal to not more than one year of In-State experience (*August 27, 2009*)
2. Successful completion of the minimum hours of approved coursework is required for each individual designation track. "Approved coursework" is defined as classroom attendance with a proctored exam. (*May 17, 2001*)
 3. Admission approval by the "Candidacy Review Sub-committee" is required.

4. Successful completion of a comprehensive examination for the designation track.
5. The comprehensive examination will be given twice each year in March and September. Candidates must apply each time to take the exam. Based on Section 40-1-46, Code of Ala. 1975 compensation of the appropriation funds will not be awarded until the following year if the candidate passing the exam in September. *To receive this compensation, the individual must have been certified for six months prior to October first. (August 15, 2019)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0203

Subject Exam Application Process

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

1. All designation tracks except Support Staff are required to take a comprehensive certification exam in order to achieve admission into their individual designation.
2. All comprehensive certification exams will be held in March and September of each year. *(May 2, 1990) (February 23, 1993) (November 18, 2021)*
3. All exam announcements will be mailed in early December and early June to the elected officials of each county by the Government and Economic Development Institute at Auburn University. All applications for admission to candidacy to a designation must be signed by the appropriate official responsible for the administration of that program (e.g. Tax Assessor/Collector, Revenue Commissioner, Director Property Tax Division).
4. Property Tax Exam Applications must be returned to the Government and Economic Development Institute by the end of January for the March exam and the end of July for the September exam on a date set by the JEAC and the Government and Economic Development Institute.
5. In February and August, the Joint Education Advisory Committee's "Candidacy Review Subcommittee" will review all exam applications and give approval to those qualified applicants.
6. It will be the responsibility of the Department of Revenue to send notification to all applicants as to their status of approval.
7. At the time of confirmation of approval to candidacy, the Government and Economic Development Institute will also mail to each candidate a study guide for their individual designation. *(May 2, 1990)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0204

Subject Application for Support Staff Levels I and II

Page 1 of 1

Supersedes

Approval Date August 27, 2009 or earlier

Effective Date August 27, 2009 or earlier

Policy

1. Support Staff Level I and II applications will be mailed to the elected officials of each county each fiscal year by the Government and Economic Development Institute. Applications must be returned to the Center on a date set by the JEAC and GEDI. (*May 2, 1990*)
2. If a person qualifies or is eligible for one of the Professional Designations (i.e. appraiser, mapper, tax administrator), that person does not qualify for any of the support staff designations. (*August 27, 2009*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0205

Subject Requirements for Support Staff Level I

Page 1 of 1

Supersedes

Approval Date August 27, 2009 or earlier

Effective Date August 27, 2009 or earlier

Policy

1. All support staff in the Office of the Tax Assessor, Tax Collector, Revenue Commissioner, License Commissioner and the Jefferson County Board of Equalization are eligible to participate.
2. Three years of experience during which the participant performs the full range of activities applicable to the office in which they are employed.
3. Successful completion of a minimum of 80 hours of approved coursework. (*June 14, 1990*)
4. If a person qualifies or is eligible for one of the Professional Designations (i.e. appraiser, mapper, tax administrator), that person does not qualify for the Support Staff Level I designation. (*August 27, 2009*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0206

Subject Requirements for Support Staff Level II

Page 1 of 1

Supersedes

Approval Date August 27, 2009 or earlier

Effective Date August 27, 2009 or earlier

Policy

1. Successful completion of Support Staff Development Level I.
2. Five years of experience in a support staff position to include a minimum of two years in a supervisory position.
3. Successful completion of 60 hours of approved coursework.
4. If a person qualifies or is eligible for one of the Professional Designations (i.e. appraiser, mapper, tax administrator), that person does not qualify for the Support Staff Level II designation. (*August 27, 2009*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0207

Subject Dual Application for Support Staff Level I and II

Page 1 of 1

Supersedes

Approval Date February 17, 2005 or earlier

Effective Date February 17, 2005 or earlier

Policy

Support Staff Level I & II designations may be simultaneously applied for, and simultaneous certification awarded, if all requirements for both designations are met. *(May 25, 1995)*

Total credit hours must be met for both programs. *(February 17, 2005)*

**Coursework for Certification in all areas and prerequisites
(Training Tracks)**

0300-0399

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0300

Subject Real Property Appraiser Education Track

Page 1 of 1

Supersedes

Approval Date October 1, 2018

Effective Date October 1, 2018

Policy

As of October 1, 2018, four courses are required:

- Alabama Real Property Appraisal Manual (*October 1, 2018*)
- Advanced Appraisal Concepts (*October 1, 2018*)
- IAAO 101 Fundamentals of Real Property Appraisal
- IAAO 102 Income Approach to Valuation

A total of 120 course work hours must be completed before sitting for the examination.

Online classes through IAAO and the ALDOR program are accepted toward certification. (*June 11, 2020*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0301

Subject Personal Property Appraiser Education Track

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Four courses are required:

- Alabama Personal Property Appraisal Manual
- Alabama Personal Property Audits
- IAAO 500 Assessment of Personal Property
- IAAO 101 Fundamentals of Real Property Appraisal

A total of 120 course work hours must be completed before sitting for the examination.

Online classes through IAAO and the ALDOR program are accepted toward certification. (*June 11, 2020*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0302

Subject License and Tax Administration Education Track

Page 1 of 1

Supersedes

Approval Date

Effective Date May 19, 2005 or earlier

Policy

Only elected or appointed county License Commissioners or Revenue Commissioners and Tax Collectors who perform the same duties may apply for this designation. A minimum three years of experience in the administration of the property tax laws of Alabama are also required for eligibility.

Four courses are required:

- Introduction to Property Tax Administration
- Property Tax Administration & Laws
- Management & Supervision
- Licensing Administration for Motor Vehicles

Remaining courses may be selected from additional Alabama Property Tax Education Courses.

A total of 120 course work hours must be completed before sitting for the examination.

Online classes through IAAO and the ALDOR program are accepted toward certification. (*June 11, 2020*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0303

Subject Alabama Certified Mapper Education Track

Page 1 of 1

Supersedes

Approval Date

Effective Date May 19, 2005 or earlier

Policy

Five courses are required:

- Basic Mapping
- Intermediate Mapping
- Advanced Mapping
- Subdivision Layouts and Mapping Right of Ways
- IAAO 600 Principles and Techniques of Cadastral Mapping (*February 15, 2001*)

A total of 130 course work hours must be completed before sitting for the examination.
(*February 15, 2001*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0304

Subject Tax Administrator Education Track

Page 1 of 1

Supersedes

Approval Date October 1, 2018 or earlier

Effective Date October 1, 2018 or earlier

Policy

Only elected or appointed county Tax Assessors, Tax Collectors, Revenue Commissioners or License Commissioners with a minimum three years of experience in the administration of the property tax laws of Alabama may apply for this designation.

Four courses are required:

- Introduction to Property Tax Administration (*May 20, 2004*)
- Property Tax Administration and Laws
- Alabama Real Property Appraisal Manual (*October 1, 2018*)
- Management and Supervision

Remaining courses may be selected from additional Property Tax Education Courses.

A total of 120 course work hours must be completed before sitting for the examination.

Online classes through IAAO and the ALDOR program are accepted toward certification. (*June 11, 2020*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0305

Subject Support Staff Level I Education Track

Page 1 of 1

Supersedes

Approval Date

Effective Date August 30, 2007 or earlier

Policy

Two courses are required:

- Introduction to Property Tax Administration (*May 20, 2004*)
- Any one of the following:
 - Introduction to the Licensing Process
 - Real and Personal Property Calculations
 - Introduction to Mapping (*November 21, 2019*)

Remaining courses may be selected from additional Property Tax Education Courses.

A total of 80 course work hours must be completed prior to certification.

Three years of experience in which the participant performs the full range of activities applicable to the office in which they are employed.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0306

Subject Support Staff Level II Education Track

Page 1 of 1

Supersedes

Approval Date

Effective Date February 17, 2005 or earlier

Policy

Two courses are required:

- Management and Supervision
- Property Tax Administration and Laws (*May 20, 2004*)

Remaining courses may be selected from additional Property Tax Education Courses.

A total of 60 course work hours must be completed before certification. If Property Tax Administration and Laws was taken toward Support Staff Level I, 60 additional credit hours must be achieved. (*February 17, 2005*)

Five years of experience in a support staff position to include a minimum of two years in a supervisory position.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0307

Subject Splitting of mapper's exam

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Mappers must pass the complete exam at the time of the examination. They may not receive credit for passing one part, but failing the other, and carry that credit over to the next year.
(November 21, 1996)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0307a

Subject Splitting of personal property exam

Page 1 of 1

Supersedes

Approval Date May 21, 2009

Effective Date 2009 or earlier

Policy

1. A personal property appraiser must pass the complete exam at the time of the examination. They may not receive credit for passing one part, but failing the other part, and carry that credit over to the next year. *(May 21, 2009)*
2. Each of the two parts of the personal property exam must be passed with a 70% or higher. *(May 21, 2009)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0307b

Subject Splitting of real property exam

Page 1 of 1

Supersedes

Approval Date May 21, 2009

Effective Date 2009 or earlier

Policy

1. A real property appraiser must pass the complete exam at the time of the examination. They may not receive credit for passing one part, but failing the other part, and carry that credit over to the next year. *(May 21, 2009)*
2. Each of the two parts of the real property exam must be passed with a 70% or higher. *(May 21, 2009)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0308

Subject Conversion of Education Tracks

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

To receive a different education track designation, all prerequisites and the passing of that particular education designation examination are required. (*August 20, 1998*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0309

Subject Requirements for more than one designation

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

A person may apply and receive certification in more than one designation. Courses taken for one designation's education requirements may be applied, as appropriate, for the new designation.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0310

Subject Real and Personal Property Calculations Course

Page 1 of 1

Supersedes

Approval Date February 16, 2012

Effective Date On or before February 16, 2012

Policy

The course Real and Personal Property Calculations will be provided for Support Staff only. However, Certified Tax Administrators are also allowed to take the course toward certification and/or recertification. (*February 16, 2012*)

Alabama Certified Appraisers (Real and Personal) and Alabama Certified Mappers will not receive credit toward recertification from this course. (*February 16, 2012*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0311

Subject Course Attendance Requirements

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Every participant is expected to be present in class and a participating member of the class. If a participant misses 2 hours or more of a 20-hour course or 3 hours or more of a 30-hour course, that individual shall not sit for the examination and must retake the course.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0312

Subject Course Attendance Requirements

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

All courses will be evaluated by the class members completing the course. (*January 8, 1986*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0313

Subject Courses upon request
Page 1 of 1
Supersedes
Approval Date November 19, 2016
Effective Date November 19, 2016 or earlier

Policy

An “On Demand” course may be offered in any county of the State at the request of the appropriate elected official provided that 20 or more participants indicate an interest to register, and that instructors and a facility are available.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0314

Subject Cancellation Policy

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Provided space is available, receipt of the registration form by mail, fax, or electronically constitutes registration. Written cancellations received fifteen (15) working days (30 days for IAAO courses) prior to the beginning of the program will be honored with a refund of the registration fee but will be assessed an administrative fee of \$50. Due to commitments to instructors and meeting facilities, late cancellations or nonattendance will not be refunded. Substitutions for registered participants may be made at any time.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0315

Subject Use of Cell Phones and Tobacco Products

Page 1 of 1

Supersedes

Approval Date May 5, 2011

Effective Date August 16, 2001

Policy

1. If it is necessary to carry a cell phone in the classroom, it must be set on a silent or discrete mode.
2. The use of tobacco products of any kind are not permitted in the classroom or areas not designated for their use.
3. Cell phones are not allowed for use as a calculator during testing. *(May 5, 2011)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0316

Subject Auditing a Class

Page 1 of 1

Supersedes

Approval Date August 15, 2019

Effective Date August 15, 2019

Policy

1. All property tax classes are reserved for county and state property tax personnel and due to certain venues and size requirements, there is normally not space for those from outside the property tax field.
2. A person who is not in a county or state property tax office who wants to register and attend a property tax class will be considered on a case-by-case basis and final approval will be determined by ALDOR.
3. If a person is approved to take a property tax class, that person is still expected to pay the registration fee and meet all pre-requisites necessary to be successful in the class.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0317

Subject Weapons, Firearms, and Weapon Accessories

Page 1 of 1

Supersedes

Approval Date August 19, 2021

Effective Date August 19, 2021

Policy

All Alabama Department of Revenue Education Program participants are strictly prohibited from carrying firearms, knives, other weapons, or weapon accessories within the classroom, workshop, or other event areas associated with the program.

While the Alabama Department of Revenue recognizes that participants have a right to protect themselves coming to and from work (i.e. to carry a weapon with a permit), that right does not extend to possessing a weapon or weapon accessory while participating in the education program.

Any individual found to be in violation of this policy will be asked to remove the weapon and/or accessory from the premises immediately. Failure to comply with this policy will result in expulsion from the classroom, workshop, or event.

For purposes of this policy, weapons include, but are not limited to, the following:
Firearms – Shotgun, rifle, pistol, revolver, or other shoulder gun including ammunition. This also includes starter guns, the frame or receiver of any such weapon; any firearm muffler or silencer; or any machine gun.

Knives of any kind
Stun Gun, Taser or instrument of like kind
or description
Air gun (e.g., air or gas-powered rifle or
pistol)
Bow and arrow (e.g., archery equipment)

Slingshots (including throwing weapons)
Swords
Crossbows
Brass knuckles
Fireworks or explosive devices
Pepper spray

**Examinations, Eligibility for Examination, Repeating
Examinations**

0400-0499

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0400

Subject Unsuccessful Completion of Examination

Page 1 of 1

Supersedes

Approval Date

Effective Date 2008 or earlier

Policy

1. If a candidate is unsuccessful in passing the exam, they would need to reapply to take the exam at a subsequent date through the normal exam application process. If a person is successful in passing the exam in September, then that person would qualify for the appropriation funds the following fiscal year beginning October 1. (*August 15, 2019*) (*November 18, 2021*)
2. A letter will be sent to those who fail indicating concept areas that were missed by 30% or more and a course will be recommended by the Property Tax Division of the Alabama Department of Revenue and the Government and Economic Development Institute to assist the participant in gaining the necessary knowledge and skills in the concept areas missed.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0402

Subject Testing Violations

Page 1 of 3

Supersedes

Approval Date May 5, 2011

Effective Date May 5, 2011

Policy

It is the policy of the Property Tax Division and the Motor Vehicle Division of ALDOR, in cooperation with the Government and Economic Development Institute at Auburn University, to uphold the integrity of the professional education and training program and the associated testing processes. Testing processes are designed to evaluate the knowledge and skills of individual employees. Violations are not acceptable and “cheating” in any form will be dealt with according to the following procedures.

The instructors/proctors in the Property Tax Professional Education and Training program are authorized to promote and ensure qualities of academic honesty and personal integrity when in the performance of their duties.

Definition of Violations and Cheating

Offenses against these policies and the Alabama Property Tax Professional Education and Training program include cheating, plagiarism, and all forms of dishonesty. A cheating or testing violation is defined as the deception of others about one’s own work or about the work of another. Examples of cheating include, but are not limited to:

- Submitting another’s work as one’s own or allowing another to submit one’s work as though it was their own
- Copying or sharing information
- Unauthorized use of technology, notes, or textbook during an exam such as pre-loading data and formulas into a calculator or other electronic device
- Stealing information from the instructor or proctor
- Falsifying records, forms, or other documents
- Academic dishonesty in a computer assignment
- Lying about these or other course or testing matters

Procedures

Actions and Consequences:

Participants who are guilty of testing violations such as these can expect to be penalized; any person who knowingly assists another participant in dishonest behavior is equally responsible and is subject to the same consequences.

Process of Reporting Dishonest Behavior:

Participants in course exams or certification exams have the responsibility to report testing irregularities when witnessed. If a fellow participant witnesses testing irregularities, that person will notify the instructor/proctor. Written notification may be requested.

In the classroom or during the certification exam the instructor/proctor has the following responsibilities:

First Step of Action:

To minimize the opportunities for participants to cheat during an examination, instructors/proctors are authorized to:

1. Inform those taking the test of the policy
2. Collect (set aside) all cell phones, textbooks, class notes, etc.
3. Move participants several feet apart from each other (if space allows)
4. Ask participants to move to another seat during the exam if cheating is suspected
5. Issue a verbal warning to participant(s) addressing the inappropriate behavior or action

Second Step of Action:

When cheating is suspected, instructors/proctors are authorized and expected to inform an offending participant that his/her behavior cannot continue and his/her exam may be considered void by ALDOR and GEDI. The instructor/proctor has the option to retrieve the test and ask the student to leave. Following the assembly of all pertinent information and consideration by ALDOR and GEDI, the student may be required or have the option to retake an exam, individually scheduled, on which he/she was suspected to have cheated.

Third Step of Action:

If inappropriate behavior or action persists, the instructor/proctor will notify the student of the instructor/proctor's intent to file a Report of Suspected Testing Violations.

Report of Suspected Testing Violations:

Instructors/proctors are required to write and attach an explanation of the specific offenses to the participant's examination before returning it to the Government and Economic Development Institute. The report will contain the instructor's or proctor's name, course name, examination date, location, student's name and a complete report of the suspected testing violations and all actions taken by the instructor/proctor.

A copy of the report will be issued to the Property Tax and/or Motor Vehicle Division Director of ALDOR and to the student.

The instructor/proctor shall have the authority to deal with instances of testing irregularities in a variety of ways including (but not limited to) recommending to GEDI and ALDOR one or more of the following courses of action:

1. Exam may be rescheduled and retaken for full or partial credit.
2. Exam may not be retaken and no credit will be given for that particular exam.
3. The student may be dropped from the course or the certification exam.
4. If dropped from the certification exam, opportunity to retake the exam will be two (2) years from reported violation.

Repeated Incidents:

If a second documented report of testing violations is reported and upheld by the Property Tax and/or Motor Vehicle Division Director of ALDOR, the person will be ineligible for participation in the Professional Education and Training program and the professional designation certification exam (if applicable).

Any person found ineligible due to testing irregularities/violations as defined in this policy has the right to appeal through the appeals process.

Appeals Process:

1. Notice is issued to the participant of the alleged testing violations with an opportunity for the participant to respond in writing.
2. The Property Tax and/or Motor Vehicle Division Director of ALDOR will review the Report of Suspected Testing Violations and the written response from the participant.
3. If the violation of testing irregularity is upheld, the participant may re-appeal to the Alabama Commissioner of Revenue who will review the Report of Suspected Testing Violations, the participant's written appeal, and the action by the Director of the Property Tax and/or Motor Vehicle Division.
4. Rulings made by the Alabama Commissioner of Revenue are final.

**Certification, Terms, Lapse of Certification,
Record Retention, Notification**

0500-0599

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0500

Subject Recertification Requirements

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

1. Thirty hours of approved courses must be completed every three years to maintain certification. If a tested course is taken, the examination for that course must be passed for any credit to apply. (*May 20, 2004*) Continuing education course hours for recertification must be obtained by March 31 of the third year. (*November 14, 1984*)
2. Courses taken prior to the award of the individual designation may not be used to meet the recertification requirements.
3. Credit toward recertification hours will generally not be given if a course is taken a second time. However, credit may be given if: (a) the course is determined by the JEAC to have undergone substantial revision; or (b) the course is sponsored by an Appraisal Foundation member organization, and the sponsoring organization allows credit towards their certification when courses are taken a second time.
4. Of the thirty hours required for recertification, fifteen hours of credit is allowed for courses and workshops offered by the JEAC, AAAO, AATA, AL Chapter of IAAO or other approved associations in which there is no examination, also called *untested credit*. The remaining fifteen hours of credit must be from courses and workshops approved by the JEAC in which an examination is given. Participants may carry over no more than a total of thirty hours of coursework to the next three-year period. Fifteen of these hours must be tested. (*October 28, 1986*). Hours eligible for rollover may not be extended to future certification periods. (*August 15, 2002*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0501

Subject Annual Recertification Status Report

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

The Government and Economic Development Institute will provide annually to the Property Tax Division of ALDOR a recertification status report for all persons active in the Property Tax Professional Education and Training program. This report will include the status of the recertification requirements for each participant.

VERIFICATION: As soon as practical after October 1 of each year, ALDOR will accept requests for payment of the award from all persons qualified to hold Property Tax designation.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0502

Subject Certification Employment Requirement

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

An individual must be an active employee of the State of Alabama or an Alabama county in the property tax field to be certified or recertified in a designation. (*January 15, 1985*)

ALDOR Administrative Rule # 810-4-4-.01

(2) ELIGIBILITY:

Persons not continuously employed on a cumulative full-time basis by a county in this state or by the state in the ad valorem tax field for any period of time prior to the six-month period ending on October 1 are not considered to have held the designation for the six-month period.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0503

Subject Certification Revocation
Page 1 of 1
Supersedes
Approval Date August 16, 2018
Effective Date August 16, 2018 or earlier

Policy

1. After a lapse of certification due to lack of sufficient continuing education hours, a certification is suspended on March 31 (of the third year of the person's certification period) and will remain suspended until the continuing education hours are brought up-to-date during the next three-year reporting period. *(November 21, 1996)*
2. After three (3) years of suspension of certification, the person must successfully repeat all the required courses in the track for which they were initially certified. Upon approval by ALDOR, the certification in that education track may be reinstated. *(August 16, 2018)*
(November 15, 2022)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0504

Subject Re-certification Notification

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

The Government and Economic Development Institute will notify individuals annually of their status in the recertification process.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0505

Subject Courses toward Re-certification

Page 1 of 2

Supersedes

Approval Date

Effective Date May 18, 2023

Policy

1. Any Property Tax Professional Education and Training course that was not required or taken toward the original certification may be used towards recertification.
2. A course may be retaken for recertification after five years.
3. Recertification credit will be awarded for participants retaking a course which has substantially changed. *(November 17, 1994)*
4. Education events sponsored by programs other than the Property Tax Professional Education and Training Program will be considered for approval on a case-by-case basis with recommendations for approval made by the Joint Education Advisory Committee.
5. All IAAO courses will be automatically counted for credit upon successful completion of the course.
6. Conferences and seminar workshops which are held outside of the Property Tax Professional Education and Training Program will be approved for untested credit on a case-by-case basis.
7. It is the responsibility of the applicant to provide documentation and request approval of any credit hours taken outside of the Property Tax Professional Education and Training Program.
8. Continuing Education Credits – No more than 15 tested credit hours may be given for recertification if taken outside of the Alabama Property Tax Professional Education and Training Program maintaining that approval must be met through the Joint Education Advisory Committee. *(May 17, 2001)*

9. All distance learning courses from outside of the Alabama Property Tax Professional Education and Training program must have approval from the JEAC before credit will be given. *(May 17, 2001)* A distance learning environment is defined as any education provided without the teacher and students being physically present together.
 - a. The JEAC may only accept distance learning courses for credit that are: (i) approved for credit by the Appraisal Foundation; or (ii) Accepted by the International Association for Continuing Education and Training (IACET) **and**, as determined by the JEAC are directly related to the technical professional requirement of the position of the applicant. Full documentation including, curriculum content, instructional methodology, and testing processes must be provided at the time of request for approval from the JEAC.
 - b. Behavioral skill distance learning courses will not be accepted for credit, unless approved by the Appraisal Foundation.
 - c. Tested hours may be given for a distance learning course, and no more than 15 untested credit hours towards recertification will be granted for distance learning courses in a single recertification period. Distance learning course credits will not rollover to succeeding recertification periods.
 - d. The JEAC reserves the right to develop and apply a formula for determining credit hour equivalencies for distance learning coursework. *(November 20, 2004)*

10. Request for approval of any course outside of the Property Tax Professional Education and Training Program, must be submitted within six (6) months of completion of the course and will only apply to the certification period in which it was taken. *(May 20, 2004)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0506

Subject Computer Vendor Courses

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Computer vendor training will count toward untested hours in the recertification program when the training is in a structured setting outside the county or state office premises. (November 18, 1999)

It is the responsibility of the applicant to provide documentation and request approval of any credit hours taken outside of the Property Tax Professional Education and Training Program.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0507

Subject State to State Credit Transfers

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Due to the specific nature of information in courses offered by states outside Alabama, credit is generally not transferable. Upon request, an exception will be considered and voted on by the JEAC on an individual basis.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0508

Subject USPAP Course Credit

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

Any *Uniform Standards of Professional Appraisal Practice* course conducted by a foundation member has standing approval of continuing education credit with the JEAC.

It is the responsibility of the applicant to provide documentation and request approval of any credit hours taken outside of the Property Tax Professional Education and Training Program.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0509

Subject Support Staff Continuing Education Program

Page 1 of 1

Supersedes

Approval Date August 25, 2016 or before

Effective Date August 25, 2016 or before

Policy

The Support Staff participants in Levels I & II will receive a certificate at the Summer AAAO Conference for his/her completion of 60 continuing education hours. The 60 hours may be tested or untested hours. If a tested course is taken however, the examination for that course must be passed for credit to apply. *(August 17, 2000)*

- 1.
2. A person can work on their continuing education after completing Level I if that person will not meet the experience requirement of Level II. *(February 19, 2004)*
3. A person who achieves Level I status may have the choice of working on their continuing education or Level II or both simultaneously. *(February 19, 2004)*
4. Remaining courses for Support Staff CE may be selected from additional property tax education courses. *(August 25, 2016)*

Instructor Guidelines, Compensation

0600-0699

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0600

Subject County and State Instructors

Page 1 of 1

Supersedes

Approval Date

Effective Date 2008 or earlier

Policy

1. The Government and Economic Development Institute will periodically hold “Instructor Preparation” courses for prospective instructors.
2. The Government and Economic Development Institute will keep instructors informed of all policies they need to follow.
3. To attend the “Instructor Preparation” course, a potential county instructor must be recommended (nominated) in writing by the appropriate senior management. Appropriate senior management is as the situation exists, either (a.) the tax assessor/tax collector/revenue commissioner/license commissioner/probate judge who is in the supervisory chain of command of a potential instructor, (b.) in the event that a tax assessor/tax collector/revenue commissioner/license commissioner/probate judge is not in the supervisory chain of command of a potential instructor, the county clerk/administrator/manager who is in the supervisory chain of command of a potential instructor, or (c.) the Jefferson County BOE Chair for employees of that office. (*May 15, 2008*)
4. A potential state instructor must have the approval (recommendation) of the Director of the ALDOR Property Tax Division to attend the “Instructor Preparation” course. (*May 15, 2008*)

The “Instructor Preparation Approval Form” found at Policy #0704 can be used to provide the nomination/recommendation.

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0601

Subject State Employees Credit for Instructing

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

1. State employees instructing, but not developing or revising a course, may receive credit hours equal to the hours instructed. *(November 19, 1998)*
2. State employees who develop or substantially revise a course may receive the maximum tested credit hours for the course. *(November 19, 1998)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0602

Subject County Employees Credit for Instructing

Page 1 of 1

Supersedes

Approval Date

Effective Date February 15, 2001 or earlier

Policy

1. County employees (and elected officials) who develop or substantially revise a course may receive the maximum tested credit hours for the course. *(November 19, 1998)*
2. County employees who teach but do not create or substantially revise a course will receive untested hours for the portion of the course at which they were present and available for instructional guidance. *(August 19, 1999)*
3. Tested credit will be available for a county employee who taught a course and declined remuneration. *(February 15, 2001)*

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0603

Subject Credit Available for Development or Instruction

Page 1 of 1

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

An instructor may receive credit for the development or instruction of a course only one time during the recertification cycle. (*August 19, 1999*)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0604

Subject Credit Available for Development or Instruction

Page 1 of 2

Supersedes

Approval Date May 2014

Effective Date May 2014 or earlier

Policy

The integrity of the Property Tax Professional Education and Training Program depends in large part upon the quality of instruction provided by the instructor teams. Development, maintenance, and expansion of the instructor teams is of vital importance. Thus, a system that encourages, recognizes, and rewards quality instruction and professionalism has been established.

Instructor Levels

There are three levels: *Instructor Trainee*, *Instructor*, and *Senior Instructor*

A. Instructor Trainee

Individuals must complete the Instructor Preparation Course (Train the Trainer) offered by the Government and Economic Development Institute, receive positive evaluations and be selected by ALDOR to become a *Trainee*.

The Trainee will assist in course instruction under the supervision of an Instructor or Senior Instructor. Assignments will include limited teaching responsibilities and assisting students with problems and exercises. Teaching responsibility will increase as competence increases.

Trainees will be evaluated by the lead instructor for the course. Comments and evaluations will be discussed with ALDOR staff and shared with the Trainee.

Trainees will be eligible for promotion to *Instructor* upon teaching 100 hours and completing the Instructor Development Course (Advanced Trainer), and receiving acceptable evaluations as well as development evaluation, developing courses, engaging in further professional development, or some combination thereof.

B. Instructor

An *instructor* will teach courses independently or in conjunction with another Instructor or Senior Instructor. Instructors will engage in course development and revision, and the development and evaluation of Trainees.

Instructors will be eligible for promotion to *Senior Instructor* upon teaching 140 hours and receiving acceptable evaluations as well as professional development evaluation, developing courses, engaging in further professional development, or some combination thereof.

C. Senior Instructor

A Senior Instructor will teach courses independently or in conjunction with other instructors, engage in course development and revision, and develop and evaluate Trainees.

All levels of instructor must attend the Instructor Roundtable Discussions periodically or at least once every five years.

Compensation:

| | |
|--------------------|-----------------------------|
| Instructor Trainee | \$100 per day plus expenses |
| Instructor | \$150 per day plus expenses |
| Senior Instructor | \$200 per day plus expenses |

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0605

Subject Code of Conduct for Instructors

Page 1 of 3

Supersedes

Approval Date August 29, 2013 or earlier

Effective Date August 29, 2013 or earlier

Policy

ALDOR and the Government and Economic Development Institute (GEDI) at Auburn University expect from its instructors the highest possible standards of personal integrity, professional competence, sound judgment, and discretion.

- I. During a teaching assignment, instructors must conduct themselves with integrity. They should maintain an appropriate professional relationship with students, both inside and outside the classroom.
 - A. Instructors are expected to maintain an open, courteous, and respectful attitude in their dealings with students.
 - B. It is the policy of ALDOR and GEDI to promote a positive learning environment for all students. Harassment and/or discriminatory behavior directed toward a person because of his or her race, ethnicity, sex or physical disability is expressly prohibited. Instructors are obligated to refrain from such behavior and are required to discourage such behavior from occurring in the classroom by others.
 - C. Instructors shall refrain from any overt statements or pointed humor that disparages the rightful dignity of any individual or group.
 - D. Instructors shall refrain from making sexual advances toward students and refrain from accepting sexual advances from students.
 - E. While in the classroom, only material appropriate to the teaching of the course should be discussed.
 - F. Instructors wishing to set up special sessions for review should do so only in a public classroom or public meeting room.
 - G. Instructors who monitor exams should offer no help to the students relative to interpreting questions on the exam.

- II. Instructors are expected to conduct themselves in an ethical, professional, and honest manner at all times.
- A. Instructors are to refrain from using their position to directly sell, promote, or otherwise encourage participants to purchase or use the speaker's products or services.
 - B. Instructors must fairly represent their credentials, qualifications, experience, and ability.
 - C. Instructors must comply with all copyright laws and the laws and regulations governing their position; they must give full credit to the source of any materials quoted or cited in writings or presentations.
 - D. Instructors are to teach approved course content and materials. Course material containing statutory or constitutional law, departmental rules and/or regulations, and formal guidelines and procedures must be presented accurately according to the specific context of the subject matter.
- III. Instructors must be committed to providing quality instruction and to their own professional development.
- A. Each instructor should strive to provide students with the highest quality education, training, and development.
 - B. Instructors should keep informed of pertinent knowledge and competence in their field; they should strive to increase their knowledge and improve their professional and instructional skills.
- IV. Dress Code:
- A. Male Instructors:
 - i. Appropriate Attire
 - Suits, sports jackets, dress slacks, khakis, Dockers, or similar slacks, dress shirts and ties
 - Shirts tucked in the pants
 - Pants with a belt or suspenders
 - Appropriate dress shoes or dress boots with socks
 - Button-up, open-collar shirt (without a tie) tucked in the pants
 - Polo style or golf shirts
 - A jacket or dress sweater/shirt may also be worn
 - Appropriate undergarments must be worn underneath shirts
 - ii. Inappropriate Attire Includes
 - Jeans/denim (any color)
 - Athletic/jogging/sweat pants or shirts (including wind suits)
 - Shorts
 - Tank Tops and see-through clothing
 - Athletic/tennis shoes or canvas shoes
 - Flip flops (regardless of name brand or design), house shoes, etc.
 - Hats, caps, or head scarves

- Sports team jerseys
- iii. Instructors may wear jeans on test day

B. Female Instructors:

i. Appropriate Attire

- Suits, dresses, skirts (no more than 2 inches above the knee)
- Coordinating dress slacks and blouses or pantsuits
- Blouses and tops must completely cover the midriff
- Sleeveless apparel that covers the width of the shoulder
- Appropriate dress shoes, dress mules or dress sandals
- Slacks (including twill pants, khakis, Dockers, etc.) worn with a coordinating top, jacket or dress sweater
- Cropped pants, mid-calf length or longer
- Polo style or golf shirts
- Appropriate undergarments must be worn underneath blouses, dresses, etc.

ii. Inappropriate Attire Includes

- Jeans/denim (any color)
- Denim skirts/jackets
- Athletic/jogging/sweat pants or shirts (including wind suits)
- Tight-fitting apparel
- Leggings
- Skirts or dresses more than two inches above the knee
- Shorts, city shorts, capri pants or skorts
- Strapless tops or spaghetti straps (unless covered by a jacket or sweater)
- Athletic/tennis shoes
- Flip flops (regardless of name brand or design), house shoes, etc.
- Hats, caps or head scarves
- Two-piece T-shirt outfits
- Cropped tops
- Any garment that reveals cleavage should not be worn

- iii. Instructors may wear jeans on test day

V. New Course Development and/or Course Material Changes

- A. If an instructor wants to make changes to current course content, the new content including exam questions will need to be submitted for review by ALDOR prior to being incorporated into the course.
- B. If an instructor is interested in developing a new course for the Property Tax program, an outline, course description and objectives of course must be submitted to ALDOR prior to development, publication and presentation.

(August 29, 2013)

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0606

Subject Course Materials Regulations

Page 1 of 1

Supersedes

Approval Date February 22, 2017 or earlier

Effective Date February 22, 2017 or earlier

Policy

The Government and Economic Development Institute (GEDI) will contact potential property tax instructors in a timely manner at least three months in advance if class is scheduled prior to three months in advance.

GEDI will, at time of confirmation, ask instructors to provide all changes to the materials by two months in advance of the class.

GEDI will then email or mail the notebooks to the instructors at least one month in advance.

Forms, Examples

0700-0799

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0700

Subject Request for Approval of Recertification

Page 1 of 2

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

The “Individual Request for Approval of Re-Certification Hours” form (attached) is to be filled out whenever an individual is attempting to receive approval for any courses, conferences, or workshops taken outside of the Property Tax Professional Education and Training program. The Government and Economic Development Institute will submit each individual’s request to the JEAC for approval and then notify the participant of the status of the request.

INDIVIDUAL REQUEST FOR APPROVAL OF RECERTIFICATION HOURS

Name _____ Last four digits of SSN _____

Address _____

Telephone _____ Fax _____

Certification

Request for:

- | | |
|--|---|
| <input type="checkbox"/> AC Appraiser-Real | <input type="checkbox"/> Tested *(Only for Appraisal Foundation Member Organization courses) |
| <input type="checkbox"/> AC Appraiser-Personal | <input type="checkbox"/> Untested |
| <input type="checkbox"/> Tax Administrator | |
| <input type="checkbox"/> Mapper | |

Number of Requested Hours _____

Course Title _____

Course Location _____ Course Date/Time _____

Organization/Agency Offering Course _____

Full documentation, including curriculum content, program, syllabus, and/or IAAO Continuing Education Form, must accompany certification request. For Distance Learning courses, curriculum content, instructional methodology, and testing processes must be provided.

Mail or fax to:

Government and Economic Development Institute
213 Extension Hall
Auburn University, AL 36849
Tel# (334) 844-4782
Fax# (334) 844-1919

JEAC Approved _____ JEAC Approval Date _____

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0701

Subject Conference and Workshop Sign-in Forms

Page 1 of 2

Supersedes

Approval Date

Effective Date 1999 or earlier

Policy

The *Property Tax Continuing Education Conference or Workshop Sign-in Form* (attached) needs to be signed whenever a participant attends an Association's conference or district workshop to receive untested hours for attendance. Support Staff personnel may also sign in for their continuing education program.

PROPERTY TAX CONTINUING EDUCATION CONFERENCE SIGN-IN

Workshop: _____

Date: _____ **Location:** _____ **Credit:** _____

Conference: _____ **Instructor:** _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

Last Four of Social Security Number: _____ **County:** _____

Name (Please Print): _____

ACAR/ACAP/ACM/ACTA/Support Staff: _____

State of Alabama Department of Revenue
Professional Education and Training Program

Policy Number 0702

Subject Examination Applications

Supersedes

Approval Date

Effective Date May 18, 2023

Policy

For each Property Tax Education designation, except Support Staff I and II, an examination application form must be completed in full and submitted to the Government and Economic Development Institute for an individual applicant to take the examination.

The applications for the following designations are available on Auburn University's website.

AC Appraiser-Personal
AC Appraiser-Real
Tax Administrator
AC Mapper

In-person and distance learning classes are accepted for certification. Applicants are responsible for submitting documentation of successful completion of an IAAO distance learning or out of state class to the Government and Economic Development Institute.

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Alabama Certified Appraiser Exam (Personal Property)

The following information will aid the candidate for the Alabama Certified Personal Property Appraiser designation in applying for candidacy and in preparing to take the ACAP comprehensive examination.

Design of Exam:

The examination is comprehensive. It is designed to test for knowledge and understanding of both general and Alabama appraisal principles, procedures, and application of appraisal skills required of a professional personal property appraiser. The examination consists of two parts. The first is composed of 50 multiple choice questions, each worth 2 points, drawn from text material in all the above-named education requirement courses. These questions deal with general appraisal theory and principles and specific Alabama provisions. Part II of the examination consists of 40 problems, based primarily on, but not limited to, the three approaches to value and problems using Alabama Department of Revenue valuation guidelines. These problems are worth 5 points each.

Each of the two parts of the personal property exam must be passed with a 70% or higher. Part I has a total of 100 points possible, with a minimum of 70 points for passing. Part II has a total of 210 points, with a minimum of 145 points for passing. Upon successful completion of this examination and completion of the experience requirements, the Personal Property designation will be conferred by the Department of Revenue.

Length of Exam:

The exam is designed to take between four and six hours. Six hours is the maximum time allowed to take the exam.

Basic Knowledge:

Alabama Personal Property Appraisal Manual; Alabama Personal Property Audits; IAAO 500 Assessment of Personal Property; and IAAO 101 Fundamentals of Real Property Appraisal are the common body of knowledge shared by each candidate. The exam has been developed around these courses. *Online IAAO classes are currently not accepted for certification.*

Dates and Location of Exam:

The ACA Exam will be given on March 13, 2020.

Examination and Certification Fee:

A non-refundable fee of \$165.00 should be submitted by the applicant at the time of applying for Admission to Candidacy. The fee includes both examination and processing costs. Please make checks payable to AUBURN UNIVERSITY.

Other (Deadline):

If the applicant is registered for a course to be held **after** the application deadline, the January 31 deadline still applies. Indicate the course and the date it is being held on the application. These applications will be processed contingent upon successful completion of the course.

MAIL ALL APPLICATIONS TO:
Property Tax Certified Examinations
Government & Economic Development Institute
213 Extension Hall
Auburn University, AL 36849-5225

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Steps for Obtaining ACA (Personal Property) Designation

I. Application for Admission to Candidacy

A. Successful completion of a minimum of 120 hours of approved coursework. The following courses (120 hours) are mandatory:

- Alabama Personal Property Appraisal Manual
- Alabama Personal Property Audits
- IAAO 500 Assessment of Personal Property (*online class not currently accepted*), and
- IAAO 101 Fundamentals of Real Property Appraisal (*online class not currently accepted*)

(Society of Real Estate Appraiser and the American Institute courses accepted by the International Association of Assessing Officers as an equivalent course for IAAO 101 may be substituted provided the candidate challenges and passes the IAAO examination.)

- B. Completion of Application for Admission to Candidacy
C. Signature of Immediate Supervisor and Elected Official.

II. Completion of Appraisal Experience Questionnaire

- A. Applicant may *not* apply to take the examination *prior* to completion of the minimum of three years' experience.
- B. A minimum of three years' experience in Alabama appraisal procedures. *Candidate's experience must include a minimum of 12 months' field related appraisal of personal property, while the remainder may be appraisal and valuation activities carried out in the office.* Out-of-State experience will be reviewed on a case-by-case basis. Out-of-State experience of three years or more will equal to not more than one year of In-State. *The required years of experience must be met by application closing date.*
- C. Complete the Appraisal Experience Questionnaire by indicating the duties and responsibilities of the tasks required for your job. A questionnaire should be completed for each position held.
- D. Signature of Immediate Supervisor and Elected Official.

III. Review by Committee

IV. Notification of the Applicant

V. Administration of the Exam

VI. Notification of Exam Results

GEDI will notify the Department of Revenue of exam results. The Department will then notify the candidate of the results. The designation will be conferred upon the successful candidate by the Department of Revenue.

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED.

THIS IS A SAMPLE DOCUMENT – DO NOT USE
Alabama Certified Appraiser (Personal Property)
Application for Admission to Candidacy

Name _____ Title _____

Last Four of Social Security Number _____ County _____

Complete Address _____

Office Phone _____ Fax Number _____

Email Address _____

REQUIRED COURSES

IAAO 101 Fundamentals of Real Property Appraisal *(online class not currently accepted)*

Course Location _____ Course Date _____ Grade _____

IAAO 500 Assessment of Personal Property *(online class not currently accepted)*

Course Location _____ Course Date _____ Grade _____

Alabama Personal Property Appraisal Manual

Course Location _____ Course Date _____ Grade _____

Personal Property Audits

Course Location _____ Course Date _____ Grade _____

ELECTIVE COURSES

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

*** Applicant supervisor (if not the elected official) and elected official must sign Appraisal Experience Questionnaire.**

I have taken the ACA (Real Property) Exam in the past (Select one) YES NO

If YES, indicate Year Last Test Taken _____

A letter will be sent to those who fail indicating concept areas that were missed by 30% or more and a course will be recommended by the Property Tax Division of the Alabama Department of Revenue and the Government and Economic Development Institute to assist the participant in gaining the necessary knowledge and skills in the concept areas missed. ***If a candidate is unsuccessful during the March exam, they will have a second opportunity on September 11, 2020 to retake the exam after registering and paying the exam fee. If a candidate is unsuccessful during the exam retake in September, that candidate would need to reapply to take the exam the following year through the normal exam application process. If a candidate is successful in passing the exam in September, they would qualify for the appropriation funds the following fiscal year beginning October 1.***

THIS IS A SAMPLE DOCUMENT – DO NOT USE

APPLICANT'S NAME _____

(COMPLETE A FORM FOR EACH JOB – COPY AS NECESSARY)

Appraisal Experience Questionnaire (please type or print)

APPLICANT'S NAME _____

Title _____ Beginning Date _____ Ending Date _____

Employer _____ Department _____

Employer's Address _____

Immediate Supervisor _____ Supervisor's Title _____

Supervisor's Phone _____

Duties and Responsibilities (please type or print)

List in detail and *in your own words* tasks required for your job position.

After reviewing this experience questionnaire, I verify that the above information is accurate and truly reflects the appraisal duties and responsibilities performed by this applicant.

Applicant's Signature _____ Date _____

Elected Official's Signature _____ Date _____

Supervisor's Signature _____ Date _____

(Required when Elected Official is Not Immediate Supervisor)

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED FOR GEDI USE ONLY

Date Received _____ Application Number _____

Course Hours Verified _____ Experience Verified _____

ADMISSION TO CANDIDACY APPROVED _____

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Alabama Certified Appraiser Exam (Real Property)

The following information will aid the candidate for the Alabama Certified Appraiser designation in applying for candidacy and in preparing to take the ACA comprehensive examination.

Design of Exam:

The ACA exam is a comprehensive examination designed to test for knowledge and understanding of general appraisal principles and the application of appraisal skills required by a professional appraiser. The exam is in two parts. Part I (3 hour) consists of 50 multiple choice questions, each worth 2 points, drawn from text material from all of the required courses relative to appraisal theory and terminology. Part II (3 hours) consists of 40 problems relating to the application of appraisal skills. These problems are worth 5 points each.

Each of the two parts of the real property exam must be passed with a 70% or higher. Part I has a total of 100 points possible, with a minimum of 70 points for passing. Part II has a total of 210 points, with a minimum of 145 points for passing. Upon successful completion of this examination and completion of the experience requirements, the Real Property designation will be conferred by the Department of Revenue.

Length of Exam:

The exam is designed to take between four and six hours. Six hours is the maximum time allowed to take the exam.

Basic Knowledge:

IAAO 101 Fundamentals of Real Property Appraisal; IAAO 102 Income Approach to Valuation; *Note: the online IAAO classes are currently not accepted toward certification.* Alabama Real Property Appraisal Manual; and Advanced Appraisal Concepts are the common body of knowledge shared by each candidate. The exam has been developed around these courses. (Residential Manual and Commercial Manual taken prior to 2018 will be accepted)

Dates and Location of Exam:

The ACA Exam will be given on March 13, 2020.

Examination and Certification Fee:

A non-refundable fee of \$165.00 should be submitted by the applicant at the time of applying for Admission to Candidacy. The fee includes both examination and processing costs. Please make checks payable to **AUBURN UNIVERSITY**.

Other (Deadline):

If the applicant is registered for a course to be held **after** the application deadline, the January 31 deadline still applies. Indicate the course and the date it is being held on the application. These applications will be processed contingent upon successful completion of the course.

MAIL ALL APPLICATIONS TO:
Property Tax Certified Examinations
Government & Economic Development Institute
213 Extension Hall
Auburn University, AL 36849-5225

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED.

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Steps for Obtaining ACA (Real Property) Designation

I. Application for Admission to Candidacy

- A. Successful completion of a minimum of 120 hours of approved coursework. The following courses (120 hours) are mandatory:
- IAAO 101 Fundamentals of Real Property Appraisal (*online class not currently accepted*),
 - IAAO 102 Income Approach to Valuation (*online class not currently accepted*),
 - Alabama Real Property Appraisal Manual, and
 - Advanced Appraisal Concepts
- (Society of Real Estate Appraisers and the American Institute courses accepted by the International Association of Assessing Officers as equivalent courses for IAAO 101 or IAAO 102 may be substituted for these courses provided the candidate challenges and passes the appropriate IAAO exam.)
- B. Completion of Application for Admission to Candidacy.
- C. Signature of Immediate Supervisor and Elected Official.

II. Completion of Appraisal Experience Questionnaire

- A. Applicant may *not* apply to take the examination *prior* to completion of the minimum of three years' experience.
- B. Minimum of three years' experience in Alabama appraisal procedures. (A candidate will be allowed no more than six months' experience in measuring and listing toward this requirement.) Out-of-State experience will be reviewed on a case-by-case basis. Out-of-State experience of three years or more will equal to not more than one year of In-State. *The required years of experience must be met by application closing date.*
- C. Complete the Appraisal Experience Questionnaire by indicating the duties and responsibilities of the tasks required for your job. A questionnaire should be completed for each position held.
- D. Signature of Immediate Supervisor and Elected Official.

III. Review by Committee

IV. Notification of the Applicant

V. Administration of the Exam

VI. Notification of Exam Results

GEDI will notify the Department of Revenue of exam results. The Department will then notify the candidate of the results. The designation will be conferred upon the successful candidate by the Department of Revenue.

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED.

THIS IS A SAMPLE DOCUMENT – DO NOT USE
Alabama Certified Appraiser (Real Property)
Application for Admission to Candidacy

Name _____ Title _____

Last Four of Social Security Number _____ County _____

Complete Address _____

Office Phone _____ Fax Number _____

Email Address _____

REQUIRED COURSES

IAAO 101 Fundamentals of Real Property Appraisal *(online class not currently accepted)*

Course Location _____ Course Date _____ Grade _____

IAAO 102 Income Approach to Valuation *(online class not currently accepted)*

Course Location _____ Course Date _____ Grade _____

Alabama Real Property Appraisal Manual *(or, Residential and Commercial Manuals)*

Course Location _____ Course Date _____ Grade _____

Advanced Appraisal Concepts

Course Location _____ Course Date _____ Grade _____

ELECTIVE COURSES

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

*** Applicant supervisor (if not the elected official) and elected official must sign Appraisal Experience Questionnaire.**

I have taken the ACA (Real Property) Exam in the past (Select one) YES NO

If YES, indicate Year Last Test Taken _____

A letter will be sent to those who fail indicating concept areas that were missed by 30% or more and a course will be recommended by the Property Tax Division of the Alabama Department of Revenue and the Government and Economic Development Institute to assist the participant in gaining the necessary knowledge and skills in the concept areas missed. ***If a candidate is unsuccessful during the March exam, they will have a second opportunity on September 11, 2020 to retake the exam after registering and paying the exam fee. If a candidate is unsuccessful during the exam retake in September, that candidate would need to reapply to take the exam the following year through the normal exam application process. If a candidate is successful in passing the exam in September, they would qualify for the appropriation funds the following fiscal year beginning October 1.***

THIS IS A SAMPLE DOCUMENT – DO NOT USE

APPLICANT'S NAME _____

(COMPLETE A FORM FOR EACH JOB – COPY AS NECESSARY)

Appraisal Experience Questionnaire (please type or print)

APPLICANT'S NAME _____

Title _____ Beginning Date _____ Ending Date _____

Employer _____ Department _____

Employer's Address _____

Immediate Supervisor _____ Supervisor's Title _____

Supervisor's Phone _____

Duties and Responsibilities (please type or print)

List in detail and *in your own words* tasks required for your job position.

After reviewing this experience questionnaire, I verify that the above information is accurate and truly reflects the appraisal duties and responsibilities performed by this applicant.

Applicant's Signature _____ Date _____

Elected Official's Signature _____ Date _____

Supervisor's Signature _____ Date _____

(Required when Elected Official is Not Immediate Supervisor)

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED.

FOR GEDI USE ONLY

Date Received _____ Application Number _____

Course Hours Verified _____ Experience Verified _____

ADMISSION TO CANDIDACY APPROVED _____

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Alabama Certified Tax Administrator Exam

The following information will aid the candidate for the Alabama Certified Tax Administrator designation in applying for candidacy and in preparing to take the ACTA examination.

Design of Exam:

The ACTA Exam is a comprehensive examination designed to test for knowledge and understanding of the legal duties and responsibilities of assessing and collecting officials, the Alabama property appraisal process and techniques, and management theory and practice.

Length of Exam:

The exam is designed to take three to four hours. Four hours is the maximum time allowed to take the exam.

Basic Knowledge:

Alabama Course Introduction to Property Tax Administration; Alabama Property Tax Administration and Laws; Alabama Real Property Appraisal Manual (Residential Manual Grandfathered); and Management and Supervision are the common body of knowledge shared by each candidate. The exam has been developed around these courses.

Dates and Location of Exam:

The ACTA Exam will be given on March 13, 2020.

Examination and Certification Fees:

A non-refundable fee of \$165.00 should be submitted by the applicant at the time of applying for Admission to Candidacy. The fee includes both examination and processing costs. Please make checks payable to AUBURN UNIVERSITY.

Other (Deadline):

If the applicant is registered for a course to be held **after** the application deadline, the January 31 deadline still applies. Indicate the course and the date it is being held on the application. These applications will be processed contingent upon successful completion of the course.

MAIL ALL APPLICATIONS TO:
Property Tax Certified Examinations
Government & Economic Development Institute
213 Extension Hall
Auburn University, AL 36849-5225

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Steps for Obtaining ACTA Designation

- I. **Application for Admission to Candidacy**
 - A. Successful completion of a minimum of 120 hours of approved coursework. Of the 120 hours to be completed, four courses or 100 hours are mandatory:
 - Introduction to Property Tax Administration
 - Alabama Property Tax Administration and Laws
 - Alabama Real Property Appraisal Manual, and
 - Management and Supervision.
 - B. Completion of Application for Admission to Candidacy
- II. **Completion of Tax Administration Experience Form**
 - A. Applicant may *not* apply to take the examination *prior* to completion of the minimum of three years' experience.
 - B. Must be an elected or appointed Tax Assessor, Tax Collector, License Commissioner or Revenue Commissioner, with three years' experience in the administration of the ad valorem tax laws of Alabama. *The required years of experience must be met by application closing date.*
- III. **Review by Committee**
- IV. **Notification of the Applicant**
- V. **Administration of the Exam**
- VI. **Notification of Exam Results**

GEDI will notify the Department of Revenue of exam results. The Department will then notify the candidate of the results. The designation will be conferred upon the successful candidate by the Department of Revenue.

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED

THIS IS A SAMPLE DOCUMENT – DO NOT USE
Alabama Tax Administrator
Application for Admission to Candidacy

Name _____ Title _____

Last Four of Social Security Number _____ County _____

Complete Address _____

Office Phone _____ Fax Number _____

Email Address _____

REQUIRED COURSES

Introduction to Property Administration

Course Location _____ Course Date _____ Grade _____

Alabama Property Tax Administration and Laws

Course Location _____ Course Date _____ Grade _____

Alabama Real Property Appraisal Manual (or, Residential Manual)

Course Location _____ Course Date _____ Grade _____

Management and Supervision

Course Location _____ Course Date _____ Grade _____

ELECTIVE COURSES

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

*** Applicant supervisor (when not the elected official) and elected official must sign Experience Questionnaire.**

I have taken the ACTA Exam in the past (Select one) YES NO

If YES, indicate Year Last Test Taken _____

A letter will be sent to those who fail indicating concept areas that were missed by 30% or more and a course will be recommended by the Property Tax Division of the Alabama Department of Revenue and the Government and Economic Development Institute to assist the participant in gaining the necessary knowledge and skills in the concept areas missed. *If a candidate is unsuccessful during the March exam, they will have a second opportunity on September 11, 2020 to retake the exam after registering and paying the exam fee. If a candidate is unsuccessful during the exam retake in September, that candidate would need to reapply to take the exam the following year through the normal exam application process. If a candidate is successful in passing the exam in September, they would qualify for the appropriation funds the following fiscal year beginning October 1.*

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Alabama Certified Mapper Exam

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED

The following information will aid the candidate for the Alabama Certified Mapper designation in applying for candidacy and in preparing to take the ACM comprehensive examination.

Design of Exam:

The ACM Exam is a comprehensive examination designed to test for knowledge and understanding of mapping principles and the application of mapping skills required of a professional mapper. The exam is in two parts. Part I (2 hours) consists of 100 multiple choice and true/false questions dealing with all aspects of mapping, especially material specific to Alabama. Part II (5 hours) consists of a major case problem relating to the application of mapping.

Each of the two parts of the mapping exam must be passed with a 70% or higher. Part I has a total of 100 points possible, with a minimum of 70 points for passing. Part II has a total of 200 points, with a minimum of 145 points for passing. Upon successful completion of this examination and completion of the experience requirements, the Certified Mapper designation will be conferred by the Department of Revenue.

Format of Exam:

The exam is designed to take seven hours to complete. Two hours are allowed for Part I of the exam. A maximum of five hours are allowed for Part II.

Basic Knowledge:

Alabama Basic Mapping, Alabama Intermediate Mapping, Alabama Advanced Mapping, Alabama Subdivision Layouts & Right of Ways and IAAO 600 Cadastral Mapping are the common body of knowledge shared by each candidate. **Note: Online IAAO classes are currently not accepted toward certification.** The exam has been developed around these areas.

Dates and Location of Exam:

Part I of the exam will be given on March 12 and Part II of the exam will be given on March 13, 2020.

Examination and Certification Fee:

A non-refundable fee of \$165.00 should be submitted by the applicant at the time of applying for Admission to Candidacy. The fee includes both examination and processing costs. Please make checks payable to AUBURN UNIVERSITY.

Other (Deadline):

If the applicant is registered for a course to be held **after** the application deadline, the January 31 deadline still applies. Indicate the course and the date it is being held on the application. These applications will be processed contingent upon successful completion of the course.

MAIL ALL APPLICATIONS TO:
Property Tax Certified Examinations
Government & Economic Development Institute
213 Extension Hall
Auburn University, AL 36849-5225

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Steps for Obtaining ACM Designation

I. Application for Admission to Candidacy

- A. Successful completion of a minimum of 130 hours of approved coursework. The 130 hours consists of:
 - Alabama Basic Mapping
 - Alabama Intermediate Mapping
 - Alabama Advanced Mapping
 - Alabama Subdivision Layouts & Right of Ways, and
 - IAAO 600 Cadastral Mapping (Online class currently not accepted).
- B. Completion of Application for Admission to Candidacy
- C. Signature of Immediate Supervisor and Elected Official

II. Completion of Mapping Experience Form

- A. Applicant may not apply to take the examination prior to completion of the minimum of three years' experience.
- B. A minimum of three years applied experience in Alabama mapping procedures is required. Out-of-State experience will be reviewed on a case-by-case basis. Out-of-State experience of three years or more will equal to not more than one year of In-State. The required years of experience must be met by application closing date.
- C. Signature of Immediate Supervisor and Elected Official

III. Review by Committee

IV. Notification of the Applicant

V. Administration of the Exam

VI. Notification of Exam Results

GEDI will notify the Department of Revenue of exam results. The Department will then notify the candidate of the results. The designation will be conferred upon the successful candidate.

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED

THIS IS A SAMPLE DOCUMENT – DO NOT USE

**Alabama Certified Mapper
Application for Admission to Candidacy**

Name _____ Title _____

Last Four of Social Security Number _____ County _____

Complete Address _____

Office Phone _____ Fax Number _____

Email Address _____

REQUIRED COURSES

Alabama Basic Mapping

Course Location _____ Course Date _____ Grade _____

Alabama Intermediate Mapping

Course Location _____ Course Date _____ Grade _____

Alabama Advanced Mapping

Course Location _____ Course Date _____ Grade _____

Alabama Subdivision Layouts and Right of Ways

Course Location _____ Course Date _____ Grade _____

IAAO 600 Cadastral Mapping (*online class not currently accepted*)

Course Location _____ Course Date _____ Grade _____

*** Applicant’s supervisor (when not the elected official) and elected official must sign Experience Questionnaire.**

I have taken the ACM Exam in the past (Select one) YES NO

If YES, indicate Year Last Test Taken _____

A letter will be sent to those who fail indicating concept areas that were missed by 30% or more and a course will be recommended by the Property Tax Division of the Alabama Department of Revenue and the Government and Economic Development Institute to assist the participant in gaining the necessary knowledge and skills in the concept areas missed. *If a candidate is unsuccessful during the March exam, they will have a second opportunity on September 11, 2020 to retake the exam after registering and paying the exam fee. If a candidate is unsuccessful during the exam retake in September, that candidate would need to reapply to take the exam the following year through the normal exam application process. If a candidate is successful in passing the exam in September, they would qualify for the appropriation funds the following fiscal year beginning October 1.*

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED.

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Mapping Experience

An applicant for Admission to Candidacy for the Alabama Certified Mapper designation must have a minimum of three years' applied experience in Alabama mapping procedures. On separate forms provide the information requested in fulfillment of this requirement.

(COMPLETE A FORM FOR EACH JOB – COPY AS NECESSARY)

APPLICANT'S NAME _____

Title _____ Beginning Date _____ Ending Date _____

Employer _____ Department _____

Employer's Address _____

Immediate Supervisor _____ Supervisor's Title _____

Supervisor's Phone _____

Duties and Responsibilities (please type or print)

List in detail and *in your own words* tasks required for your job position.

After reviewing this experience form, I verify that the information is accurate and truly reflects the duties and responsibilities of this applicant.

Applicant's Signature _____ Date _____

Elected Official's Signature _____ Date _____

Supervisor's Signature _____ Date _____

(Required when Elected Official is Not Immediate Supervisor)

APPLICATIONS RECEIVED AFTER JANUARY 31, 2020 WILL NOT BE PROCESSED.

FOR GEDI USE ONLY

Date Received _____ Application Number _____

Course Hours Verified _____ Experience Verified _____

ADMISSION TO CANDIDACY APPROVED _____

State of Alabama Department of Revenue Professional Education and Training Program

Policy Number 0703

Subject Support Staff Application Forms

Page 1 of 8

Supersedes

Approval Date

Effective Date 2007 or earlier

Policy

If a person is interested in applying for the Support Staff Level I or Level II designation or for the Continuing Education in Support Staff, they must fill out the application form (sample attached) and return to the Government and Economic Development Institute.

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Property Tax Support Staff Certificate Requirements

Support Staff Development – Level I

Certificate of Completion

Requirements:

1. Submit the completed application postmarked before **April 26, 2019**. Applications submitted after **April 26, 2019** will be returned to the applicant. If the applicant is registered for a course to be held **after** the deadline, the April 26 deadline still applies.
2. All support staff employed in the offices of the Tax Assessor, Tax Collector, Revenue Commissioner, and the License Commissioner, Probate Judge, and the Jefferson County Board of Equalization are eligible to participate.
3. Three years of experience in which the participant performs the full range of activities applicable to the office in which they are employed. **The three years' experience must be met by the application deadline date.**
4. Successful completion of a total of 80 hours of approved coursework.
5. If a person qualifies or is eligible for one of the Professional Designations (i.e. Appraiser, Mapper, Tax Administrator), that person does not qualify for the Support Staff Level I designation.
6. Completion of two courses:
 - *Alabama Introduction to Property Tax Administration*,
AND, either
 - *Introduction to Licensing Administration*, **OR**
 - *Real and Personal Property Calculations*, **OR**
 - *AL Basic Mapping*

Support Staff Development – Level II

Certificate in Basic Supervisory Management

Requirements:

1. Submit the completed application postmarked before **April 26, 2019**. Applications submitted after **April 26, 2019** will be returned to the applicant. If the applicant is registered for a course to be held **after** the deadline, the April 26 deadline still applies.
2. Successful completion of Support Staff Development Level I.

THIS IS A SAMPLE DOCUMENT – DO NOT USE

3. Five years' experience in a support staff position to include a minimum of two years in a supervisory position. **The five years' experience must be met by the application deadline date.**
4. Successful completion of a total of 60 hours of approved coursework.
5. If a person qualifies or is eligible for one of the Professional Designations (i.e. Appraiser, Mapper, Tax Administrator), that person does not qualify for the Support Staff Level II designation.
6. Completion of two courses:
 - *Alabama Management and Supervision, and*
 - *AL Property Tax Administration and Laws (A total of 40 additional credit hours if Administration and Laws was taken toward Support Staff Level I)*

Property Tax Support Staff Certification Program

Continuing Education

Requirements:

Support Staff participants in Levels I & II will receive a certificate at the Summer AAO Conference for his or her completion of 60 continuing education hours. The 60 hours may be tested or untested hours. If a tested course is taken however, the examination for that course must be passed in order for credit to apply.

1. A person can work on their continuing education after completing Level I if that person will not meet the experience requirement of Level II.
2. A person who achieves Level I status may have the choice of working on their continuing education or Level II or both simultaneously.
3. Contact the GEDI Training Unit at (334) 844-4782 if you think you qualify.

THIS IS A SAMPLE DOCUMENT – DO NOT USE
Property Tax Support Staff Certificate Program Application – Level I

Name _____ Title _____

Last Four of Social Security Number _____ Date _____

Complete Address _____

Phone Number _____ Fax Number _____

County _____ Title _____

Email (must be personal work or home) _____

EXPERIENCE

Position or Title _____ Dates of Employment _____
Position or Title _____ Dates of Employment _____

COURSEWORK – REQUIRED

Alabama Introduction to Property Tax Administration

Course Location _____ Course Date _____ Pass or Fail _____

AND EITHER:

Real and Personal Property Calculations

Course Location _____ Course Date _____ Pass or Fail _____

OR

Introduction to the Licensing Process

Course Location _____ Course Date _____ Pass or Fail _____

OR

Alabama Basic Mapping

Course Location _____ Course Date _____ Pass or Fail _____

COURSEWORK – ELECTIVES (40 hours)

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Application Processing Fee: \$75.00 (Nonrefundable)

Make checks payable to **Auburn University** and return with completed application to:

Property Tax Support Staff Certificate
Government & Economic Development Institute
213 Extension Hall
Auburn University, AL 36849-5225

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Level I – Property Tax Support Staff Certificate Application

EXPERIENCE

Three years of experience in the offices of Tax Assessor, Tax Collector, Revenue Commissioner, License Commissioner, Probate Judge, or with the Jefferson County Board of Equalization is required. This must be applied experience in which the applicant performs the full range of activities applicable to the office in which they are employed.

EMPLOYMENT DUTIES AND RESPONSIBILITIES

1. Job _____ **Date of Employment** _____

Describe the duties and responsibilities of this job. (Use additional paper if necessary)

2. Job _____ **Date of Employment** _____

Describe the duties and responsibilities of this job. (Use additional paper if necessary)

VERIFICATION

As the elected official I fully support this application and verify that the above is an accurate description of duties and responsibilities performed, and that the applicant meets the minimum experience required.

Official's Signature _____ Date _____

Supervisor's Signature (when appropriate) _____ Date _____

FOR GEDI USE ONLY

Date Received _____ Application Number _____

Course Hours Verified _____ Experience Verified _____

ADMISSION TO CANDIDACY APPROVED _____

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Property Tax Support Staff Certificate Program Application – Level II

Name _____ Title _____

Last Four of Social Security Number _____ Date _____

Complete Address _____

Phone Number _____ Fax Number _____

County _____ Title _____

Date Level I Certificate Received _____

Email (must be personal work or home) _____

EXPERIENCE

Position or Title _____ Dates of Employment _____

Position or Title _____ Dates of Employment _____

COURSEWORK – REQUIRED

Alabama Management and Supervision

Course Location _____ Course Date _____ Pass or Fail _____

Alabama Property Tax Administration and Laws

Course Location _____ Course Date _____ Pass or Fail _____

COURSEWORK – ELECTIVES (10 hours)

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Elective Course Title _____

Course Location _____ Course Date _____ Grade _____

Application Processing Fee: \$75.00 (Nonrefundable)

Make checks payable to **Auburn University** and return with completed application to:

Property Tax Support Staff Certificate
Government & Economic Development Institute
213 Extension Hall
Auburn University, AL 36849-5225

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Level II – Property Tax Support Staff Certificate Application

EXPERIENCE

Five years of experience in the office of Tax Assessor, Tax Collector, Revenue Commissioner, License Commissioner, Probate Judge, or in the Jefferson County Board of Equalization is required. This must be applied experience in which the applicant performs the full range of activities applicable to the office in which they are employed. The five years of experience must include two years of experience in a supervisory position in the Tax Assessor, Tax Collector, Revenue Commissioner, License Commissioner, Probate Judge, or Jefferson County Board of Equalization offices.

EMPLOYMENT DUTIES AND RESPONSIBILITIES

1. Job Title _____ **Dates of Employment** _____

Number of employees supervised:

Supervisory Position and Experience - Describe the duties and responsibilities of this job. (Use a separate sheet of paper if necessary.)

2. Job Title _____ **Dates of Employment** _____

Number of employees supervised:

Supervisory Position and Experience - Describe the duties and responsibilities of this job. (Use a separate sheet of paper if necessary.)

THIS IS A SAMPLE DOCUMENT – DO NOT USE

Level II – Property Tax Support Staff Certificate Application

3. Job Title _____ **Dates of Employment** _____

Number of employees supervised:

Supervisory Position and Experience - Describe the duties and responsibilities of this job. (Use a separate sheet of paper if necessary.)

VERIFICATION

As the elected official I fully support this application and verify that the above is an accurate description of duties and responsibilities performed, and that the applicant meets the minimum experience required.

Official's Signature _____ Date _____

Supervisor's Signature (when appropriate) _____ Date _____

FOR GEDI USE ONLY

Date Received _____ Application Number _____

Course Hours Verified _____ Experience Verified _____

ADMISSION TO CANDIDACY APPROVED _____

State of Alabama Department of Revenue Professional Education and Training Program

Policy Number 0704

Subject Instructor Preparation Approval Form

Page 1 of 2

Supersedes

Approval Date

Effective Date 2008 or earlier

Policy

A potential county instructor must be recommended (nominated) in writing by the appropriate senior management as established in Policy #0600. The following form, *Instructor Preparation Approval Form*, may be used.

Instructor Preparation Approval Form

To attend the “Instructor Preparation” course, a potential county instructor must be recommended (nominated) in writing by the appropriate senior management. Appropriate senior management is either (a.) the tax assessor/tax collector/revenue commissioner/license commissioner/probate judge who is in the supervisory chain of command of a potential instructor, (b.) if a tax assessor/tax collector/revenue commissioner/license commissioner/probate judge is not in the supervisory chain of command of a potential instructor, the county clerk/administrator/manager who is in the supervisory chain of command of a potential instructor, or (c.) the Jefferson County BOE Chair for employees of that office.

I _____,
title _____

do hereby recommend _____ to attend the
Instructor Preparation course.

Signed: _____ Date: _____

APPENDIX A: COURSE DESCRIPTIONS