

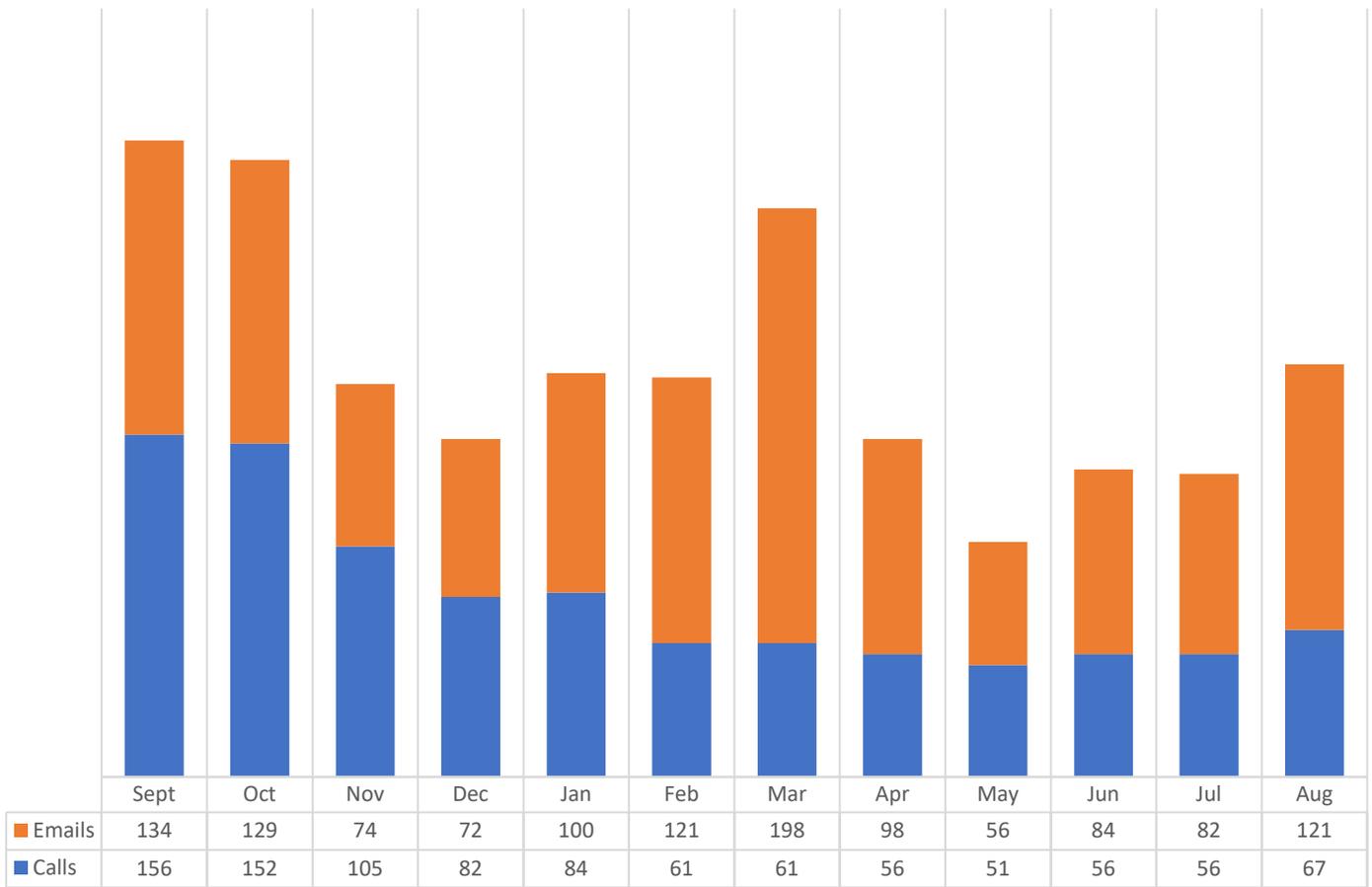
**PTP ADVISORY BOARD  
LICENSING STATISTICS REPORT  
November 1, 2018**

	<b>FY '18</b>	<b>FY '17</b>	<b>FY '16</b>	<b>FY '15</b>
<b>APPRAISER</b>				
<b>New Licenses Issued</b>	<b>323</b>	<b>210</b>	<b>284</b>	<b>300</b>
<b>Renewed Licenses Issued</b>	<b>2659</b>	<b>1,676</b>	<b>2,602</b>	<b>2,416</b>
<b>* Total Population</b>	<b>2813</b>	<b>2,780</b>	<b>2,691</b>	<b>2,652</b>
<b>COLLECTOR</b>				
<b>New Licenses Issued</b>	<b>19</b>	<b>8</b>	<b>24</b>	<b>19</b>
<b>Renewed Licenses Issued</b>	<b>151</b>	<b>142</b>	<b>168</b>	<b>159</b>
<b>* Total Population</b>	<b>172</b>	<b>179</b>	<b>187</b>	<b>178</b>
<b>ASSESSOR/COLLECTOR</b>				
<b>New Licenses Issued</b>	<b>57</b>	<b>38</b>	<b>53</b>	<b>48</b>
<b>Renewed Licenses Issued</b>	<b>568</b>	<b>286</b>	<b>564</b>	<b>549</b>
<b>*Total Population</b>	<b>622</b>	<b>608</b>	<b>604</b>	<b>613</b>

**\*The population number is a snapshot of the number of active licenses on the last day of the month.**

**The number of licenses issued and renewed is the total activity performed during the fiscal year.**

**PROPERTY TAX PROFESSIONALS  
CUSTOMER SERVICE CONTACTS  
FISCAL YEAR 2018**



Customer Service contact center hours 7am-8pm Mon.-Fri. Best times to call are between the hours of 7am-8am and 5pm-6pm.

- Callback feature
- Email us at: [cs.tax.professionals@tdlr.texas.gov](mailto:cs.tax.professionals@tdlr.texas.gov)
- On the PTP landing page - sign up to receive important updates about the Property Tax Professionals program via email. You will receive notices about rules, the law, fees, examination requirements, meetings and more. E-mail updates are the best way to stay informed.
- Facebook and Twitter

**TEXAS TAX PROFESSIONAL ADVISORY COMMITTEE**

**Enforcement Division Staff Report**

**November 1, 2018**

**Statistics for Property Tax Professional Program (Since Inception through 10/4/2018)**

- Cases Opened – 390
- Cases Closed Informally – 299
- Cases Closed by Statute Change – 5
- Warning Letters Issued – 14
- Cases Closed with Disciplinary Action – 15
  - Agreed Orders – 8 (five penalties totaling \$5,750, three revocations)
  - Default Orders – 4 (two penalties totaling \$1,800, two revocation)
  - Revocation by Operation of Law – 1
  - Commission Orders – 2 (Department relief denied; rehearing request ended by statute change)
- Evaluation Letter Requests – 18
- Cases Pending – 39

**Key Statistics – Fiscal Year 2018**

Shown below are key statistics for the Property Tax Professional program and for all TDLR programs combined for Fiscal Year 2018.

<b><u>Statistic</u></b>	<b><u>PTP</u></b>	<b><u>TDLR</u></b>
• Number of cases opened:	37	10,585
• Number of cases resolved:	31	9,833
• Number of Agreed Orders:	0	1,295
• Total amount of penalties assessed:	\$0	\$3,209,055
• Total amount of penalties collected:	\$0	\$1,528,594

### **Key Statistics – Fiscal Year 2017**

Shown below are key statistics for the Property Tax Professional program and for all TDLR programs combined for Fiscal Year 2017.

<b><u>Statistic</u></b>	<b><u>PTP</u></b>	<b><u>TDLR</u></b>
• Number of cases opened:	41	12,054
• Number of cases resolved:	49	12,405
• Number of Agreed Orders:	1	2,309
• Total amount of penalties assessed:	\$0	\$5,250,179
• Total amount of penalties collected:	\$0	\$2,571,951

### **Key Statistics – Fiscal Year 2016**

Shown below are key statistics for the Property Tax Professional program and for all TDLR programs combined for Fiscal Year 2016.

<b><u>Statistic</u></b>	<b><u>PTP</u></b>	<b><u>TDLR</u></b>
• Number of cases opened:	51	11,305
• Number of cases resolved:	33	12,314
• Number of Agreed Orders:	1	2,391
• Total amount of penalties assessed:	\$3,000	\$5,743,465
• Total amount of penalties collected:	\$1,500	\$2,749,020

## TEXAS TAX PROFESSIONAL ADVISORY COMMITTEE

NOVEMBER 1<sup>ST</sup>, 2018

### PERSONNEL UPDATE

#### DRIVER, OFFENDER, AND SAFETY EDUCATION (DOSE), TEAM LEAD – ANGELA “ANGIE” SCHMIDT



Angie Schmidt joined TDLR on January 16, 2018, as the Driver Education Team Lead. Coming from Oklahoma, Angela joined the Texas Department of Public Safety, her latest position was the Program Supervisor for the Handgun Licensing Division. She has scheduled, developed and provided instructional classes for more than 4,000 instructors.

Angie graduated from Cameron University with a degree in Criminal Justice. She also has an Associate of Science degree from Lawton, Ok in Law Enforcement.

#### ACCREDITATION & CERTIFICATION SPECIALIST – CARNECIA PENSON



Carnecia has 17 years of experience working in state government. She comes to us from the Board of Nursing, where she provided legal support to the attorneys. Prior to this, she held a position at the Texas Commission on Law Enforcement (TCLOE) as a Program Specialist in the Education and Training Division. Her duties included the approval of training providers and candidate approval for the TCLOE academy, administering examinations, and the approval of curriculums. She also has experience in CE and training provider approvals.

Carnecia graduated from Concordia University in Austin with a degree in Criminal Justice Management.

#### ACCREDITATION & CERTIFICATION SPECIALIST – KAYLA POTTER



Kayla began her state service with DSHS as a clerk in 2013 where she evaluated and entered personnel certification and licensure data into Versa. Kayla was promoted to an Administrative Assistant and subsequently to Team Lead for the Administrative staff. She left DSHS to pursue a career with the Texas Board of Nursing as a Licensing Specialist. In this capacity she reviewed large volumes of nursing applications, determined eligibility and reviewed sensitive criminal history information on applicants.

Kayla received a bachelor's degree in communication/business administration from Texas State University. She also holds an associate degree in General Studies from Austin Community College.

## EDUCATION AND EXAMINATION STATISTICS AND TRENDS

### EXAMINATION STATISTICS (AS OF SEPTEMBER 30<sup>TH</sup>, 2018)

<b>FY18-19</b>	<b>SEP</b>	<b>OCT</b>	<b>NOV</b>	<b>Q1</b>	<b>DEC</b>	<b>JAN</b>	<b>FEB</b>	<b>Q2</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>Q3</b>	<b>JUN</b>	<b>JUL</b>	<b>AUG</b>	<b>Q4</b>	<b>TOT</b>
<b>PASS</b>	11	-	-	11	-	-	-	0	-	-	-	0	-	-	-	0	11
<b>FAIL</b>	24	-	-	24	-	-	-	0	-	-	-	0	-	-	-	0	24
<b>TOTAL</b>	35	-	-	35	-	-	-	0	-	-	-	0	-	-	-	0	35
<b>RATE</b>	31.43%	-	-	31.43%	-	-	-	0.0%	-	-	-	0.0%	-	-	-	0.0%	31.43%

<b>FY17-18</b>	<b>SEP</b>	<b>OCT</b>	<b>NOV</b>	<b>Q1</b>	<b>DEC</b>	<b>JAN</b>	<b>FEB</b>	<b>Q2</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>Q3</b>	<b>JUN</b>	<b>JUL</b>	<b>AUG</b>	<b>Q4</b>	<b>TOT</b>
<b>PASS</b>	20	54	61	135	52	23	37	112	30	33	14	77	5	3	35	43	367
<b>FAIL</b>	19	38	32	89	23	25	24	72	29	26	19	74	18	15	37	70	305
<b>TOTAL</b>	39	92	93	224	75	48	61	184	59	59	33	151	23	18	72	113	672
<b>RATE</b>	51.28%	58.7%	65.59%	60.27%	69.33%	47.92%	60.66%	60.87%	50.85%	55.93%	42.42%	50.99%	21.74%	16.67%	48.61%	38.05%	54.61%

<b>FY16-17</b>	<b>SEP</b>	<b>OCT</b>	<b>NOV</b>	<b>Q1</b>	<b>DEC</b>	<b>JAN</b>	<b>FEB</b>	<b>Q2</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>Q3</b>	<b>JUN</b>	<b>JUL</b>	<b>AUG</b>	<b>Q4</b>	<b>TOT</b>
<b>PASS</b>	30	55	49	134	39	26	34	99	32	61	14	107	11	13	22	46	386
<b>FAIL</b>	16	45	37	98	26	19	27	72	31	39	15	85	6	13	19	38	293
<b>TOTAL</b>	46	100	86	232	65	45	61	171	63	100	29	192	17	26	41	84	679
<b>RATE</b>	65.22%	55.0%	56.980%	57.76%	60.0%	57.78%	55.74%	57.82%	50.79%	61.0%	48.28%	55.73%	64.71%	50.0%	53.66%	54.76%	56.85%

**EXAMINATION BY LICENSE TYPE  
(AS OF SEPTEMBER 30<sup>TH</sup>, 2018)**

<b>1<sup>ST</sup> Q</b>					<b>2<sup>ND</sup> Q</b>				
<b>SEP -- OCT -- NOV</b>					<b>DEC -- JAN -- FEB</b>				
<b>FY18-19</b>	<b>PASS</b>	<b>FAIL</b>	<b>TOT</b>	<b>RATE</b>	<b>FY18-19</b>	<b>PASS</b>	<b>FAIL</b>	<b>TOT</b>	<b>RATE</b>
APPRAISER LEVEL 3	7	13	20	35.00%	APPRAISER LEVEL 3	-	-	0	0.0%
APPRAISER LEVEL 4	3	7	10	30.00%	APPRAISER LEVEL 4	-	-	0	0.0%
ASSESSOR LEVEL 4	1	4	5	20.00%	ASSESSOR LEVEL 4	-	-	0	0.0%
COLLECTOR LEVEL 3	0	0	0	0.00%	COLLECTOR LEVEL 3	-	-	0	0.0%
<b>TOTAL</b>	<b>11</b>	<b>24</b>	<b>35</b>	<b>31.43%</b>	<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>

<b>3<sup>RD</sup> Q</b>					<b>4<sup>TH</sup> Q</b>				
<b>MAR -- APR -- MAY</b>					<b>JUN -- JUL -- AUG</b>				
<b>FY18-19</b>	<b>PASS</b>	<b>FAIL</b>	<b>TOT</b>	<b>RATE</b>	<b>FY18-19</b>	<b>PASS</b>	<b>FAIL</b>	<b>TOT</b>	<b>RATE</b>
APPRAISER LEVEL 3	-	-	0	0.0%	APPRAISER LEVEL 3			0	0.0%
APPRAISER LEVEL 4	-	-	0	0.0%	APPRAISER LEVEL 4	-	-	0	0.0%
ASSESSOR LEVEL 4	-	-	0	0.0%	ASSESSOR LEVEL 4	-	-	0	0.0%
COLLECTOR LEVEL 3	-	-	0	0.0%	COLLECTOR LEVEL 3	-	-	0	0.0%
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>	<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>

## CONTINUING EDUCATION TOTAL COURSE STATISTICS (AS OF SEPTEMBER 30<sup>TH</sup>, 2018)

FY18-19	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
<b>TOTAL COURSES</b>	2,349	-	-	2,349	-	-	-	0	-	-	-	0	-	-	-	0	2,349

FY17-18	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
<b>TOTAL COURSES</b>	929	984	973	973	1,016	988	1,015	1,015	1,005	985	970	970	973	1,017	1,025	1,025	1,025

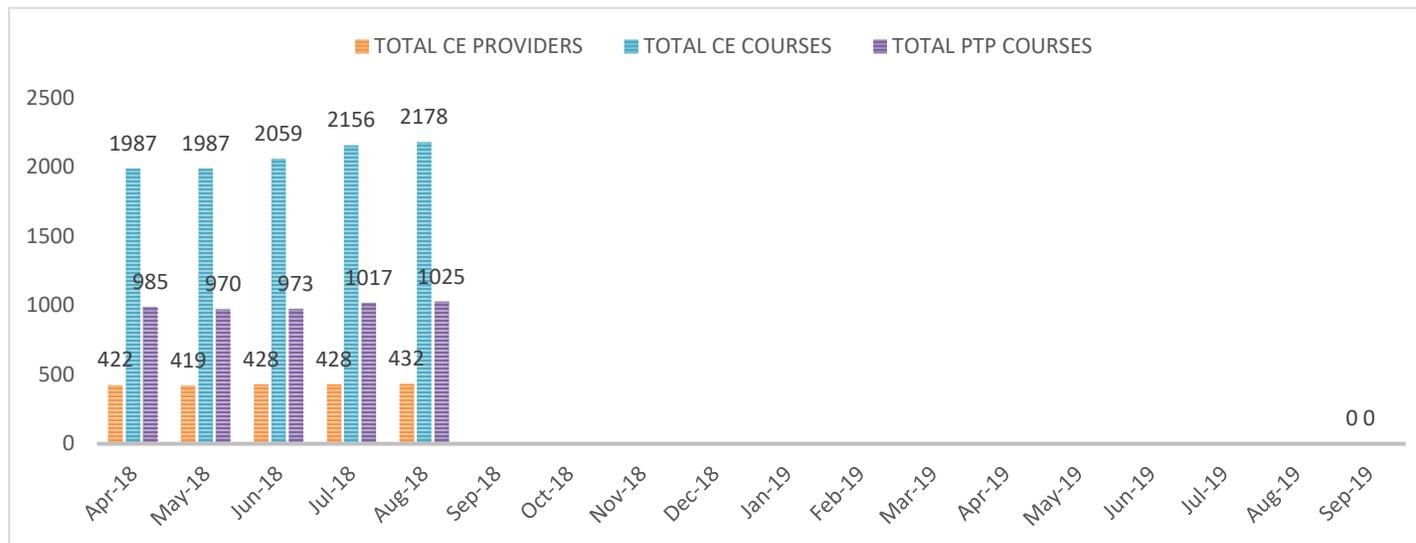
  

FY16-17	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
<b>TOTAL COURSES</b>	908	915	916	916	920	897	913	913	902	931	967	967	929	924	908	908	908

FY15-16	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
<b>TOTAL COURSES</b>	862	892	935	935	905	848	899	899	874	900	836	836	855	890	915	915	915

## CONTINUING EDUCATION ANALYSIS



## **Regulatory Program Management Division Report**

### **TAX PROFESSIONAL ADVISORY COMMITTEE MEETING**

**November 1, 2018**

#### **RPM Division**

a. **Personnel changes.** Since your last meeting, the Compliance Division has been renamed the Regulatory Program Management Division and reorganized. David Gonzales is now the director of the division and Lee Parham is the assistant director. The RPM Division is organized into subgroups: the PTP resides within the Business and Consumer Safety Group and lead by Charlotte Melder. Ms. Melder is new to the RPM Division but is a veteran attorney from TDLR's Enforcement Division. Russ Taulli continues to serve as the PTP program specialist.

b. **Overview of the Methods and Assistance Program.** Each year, the Comptroller of Public Accounts assesses how well Central Appraisal Districts (CADs) perform their tax collecting and appraisal duties. This is known as the Methods and Assistance Program or MAP. The MAP review includes recommendations that will allow an appraisal district to comply with laws, rules, regulations, appraisal practices or best operating practices in property taxation.

After the review, each CAD has one year to work with the Comptroller to resolve any outstanding MAP recommendations. If an appraisal district has unresolved recommendations after one year, they are referred to TDLR. TDLR will then work with each CAD to resolve the outstanding issues.

In January 2018, the Comptroller's office referred seventeen CADs to TDLR. These are: Anderson, Brewster, Cass, Collingsworth, Culberson, Duval, Harrison, Hudspeth, Jack, Jeff Davis, Jim Hogg, Knox, Mason, Maverick, Presidio, San Patricio, and Terry counties.

Maverick, Presidio, San Patricio and Terry CADs have resolved all their outstanding MAP recommendations. The other CADs are still under review.