Are You Getting the Most Out of PTMS?

Maximize Your PTMS ROI with Our Training and Professional Services

PTMS

Property Tax Made Simple

PTMS Training

TCI offers a multitude of training courses to provide you with the knowledge and skills required to successfully manage your property tax compliance processes and satisfy your internal reporting requirements. Our training courses allow you to work with your own company data, whenever possible, to provide a realistic training experience and maximize your return on investment in PTMS property tax software.

PTMS Basics

PTMS Basics courses provide you with a clear understanding of the fundamentals of PTMS. TCI offers several variations of the PTMS Basics training course, giving you the flexibility to customize your learning experience.

Course Options

Business Personal Property

This three-day class teaches you how to import, classify, and report personal property on tax returns. In addition, the session explains how to process tax payments using PTMS. For tax departments that also manage state-assessed property or real property, an extra day can be added to the standard three-day training course for each topic.

Real Property

This two-day class covers all aspects of managing real property including how to import real property, track and evaluate values, manage appeals, and process tax payments.

Delivery Methods

San Diego Classroom Training

TCI conducts training courses regularly throughout the year at our corporate offices in San Diego, California. Training schedules are published on TCI's Web site (www.taxcomp.com).

Onsite Training

TCI can send experienced training professionals to your location and provide training customized to your needs and preferences. Course duration varies based on your individual training goals.

Regional Classroom Training

TCI offers regionally-based basic training classes to reduce the costs associated with attending training in San Diego or on-site training. TCI periodically schedules such sessions in cities across the US and structures them to cover the same material as San Diego Classroom Training.

Web-Based Training

Using Web conferencing software and a speakerphone, our San Diego-based instructors engage you in an online classroom. Web sessions are scheduled in two- hour increments over a series of days to cover the same material as San Diego Classroom Training.

PTMS Advanced

PTMS Advanced moves beyond basic compliance tasks and provides you with the knowledge and skills to master the entire PTMS system. Only property tax professionals who have previously acquired a firm understanding of PTMS fundamentals should participate in this course.

Course Options

PTMS Advanced provides a uniquely tailored training solution by allowing you to define the length and scope of each class. Topics offered and course duration varies based on your individual needs and preferences. Below is a list of topics you may want to consider including in your PTMS Advanced course:

- Advanced Tips for Tax Return Preparation
- Managing Asset Valuations to Minimize Taxes
- Advanced Tax Bill Processing
- Getting More out of Reports
- Forecasting
- Accruals and Journal Entries

Delivery Methods

San Diego Classroom Training

TCI conducts training courses regularly throughout the year at our corporate offices in San Diego, California. Advanced training courses can be requested and scheduled using the online registration form on TCI's Web site (www.taxcomp.com). We encourage reserving a PTMS Advanced training course several weeks in advance.

Onsite Training

TCI can send its experienced training professionals to your location and provide training customized to your needs and preferences. Course duration varies based on your training goals.

Web-Based Training

Using Web conferencing software and a speakerphone, our San Diego-based instructors engage you in an online classroom. Web sessions are scheduled in two-hour increments over a series of days to cover the content of interest. Attendance is limited to one company.

PTMS Supplemental Training

Supplemental Training augments and refreshes your PTMS Basics and PTMS Advanced training and focuses on a specific topic or function within PTMS. While both novice and experienced PTMS users benefit from these courses, Supplemental Training options by themselves do not provide you the requisite PTMS knowledge or skill level to efficiently use PTMS.

Webinars

These live, Web-based, topic-specific seminars combine the benefits of live instruction with the convenience of the Web.

Training On-Demand

These pre-recorded, topic-specific tutorials provide you with 24/7 access to training. Simply log onto the Customer Zone our Web site, www.taxcomp.com, and view them at your convenience.

Conferences

TCI User Conference

TCI hosts an annual conference for its customers each fall. The TCI User Conference is an excellent training opportunity, featuring a multitude of topics presented by TCI staff members and PTMS users. Many sessions sharpen your software skills set, while others keep you up-to-date on the most recent trends in property tax. Workshop sessions in computer labs provide hands-on experience to supplement the classroom lectures.

PTMS Professional Services

PTMS Optimization Services

PTMS Optimization Services ensure you maximize your investment in PTMS and realize measurable performance improvements in your property tax operations. Our property tax professionals work with your staff to design and implement a strategic performance optimization plan customized to your needs and objectives. Areas of focus include:

- PTMS Best Practices
- Property Tax Workflow
- Customized PTMS Manual Reflecting Your Workflows
- Special Projects
- Intradepartmental and Interdepartmental Process Management
- Systems Integration

Systems Integration and Implementation Services

TCI offers custom programming services and utilities to enhance the data you manage, report, and interface with PTMS. We can analyze your internal accounting systems and tax reporting structure and create custom solutions based on your tax management objectives.

Custom Check Requests and Accounts Payable Interfaces

TCI can program Accounts Payable interfaces and hardcopy check requests to meet the data and layout requirements of your Accounts Payable Department. Attention is given to your Sarbanes-Oxley requirements, ensuring the strength of all internal controls and the security of all data transmissions to and from your accounting systems.

Custom Tax Reimbursement Requests

Whether you billback taxes to lessees, real estate tenants, or any other third party, TCI can program custom interfaces to any internal system used for managing tax reimbursements. Again, careful attention is given to your Sarbanes-Oxley requirements ensuring the strength of all internal controls and the security of all data transmissions to and from your accounting systems.

Custom Reports

TCI can program custom reports to ensure the information critical to your organization is quickly and easily accessible. Simply specify the scope of the report, the data fields to include on the report, and its desired format.

Utilities

Asset Number Replacement Utility
If your company has recently implemented a new fixed asset system or lease management system, this utility may be required. This utility replaces existing Asset Numbers in PTMS with new numbers by applying a user look-up table containing the original number and the corresponding new number to perform the replacement.

Site Code Replacement Utility
This utility replaces existing Site Codes in PTMS with new codes by applying a user look-up table containing the original code and the corresponding new code to perform the replacement.

Lease Number Replacement Utility
If your company has recently implemented a new lease management system, this utility may be required. This utility replaces existing Lease Numbers in PTMS with new numbers by applying a user look-up table containing the original number and the corresponding new number to perform the replacement.

Company Delete Utility
This utility deletes unwanted Enterprises and/or Companies and all their related data from PTMS. If your company has recently undergone a major structural change, this utility may be required.

Automated AP Export Utility
The Automated AP Export utility eliminates the need to manually perform AP exports from PTMS and streamlines the AP process. A custom utility to reformat the extracted data to meet your AP system requirements may also be required.

Custom Utility
TCI can create custom utilities to address any other company-specific objectives. Examples include updating data within PTMS from outside sources and custom data extracts from PTMS.

For more information on PTMS Training and Professional Service offerings, please call us at 858-547-4100, or visit us on the Web at www.taxcomp.com.

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