

# Interoffice Memo

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Date: January 1, 2018  
To: All County Assessors, Registered Appraisers, Appraisal Managers and Continuing Education Contacts  
From: DOR Property Tax Continuing Education Program  
Subject: Awarding of Continuing Education Credit

The Department of Revenue is committed to ensuring that appraisers and assessors/appraiser managers receive quality training to meet the continuing education requirements under Oregon Statutes. This policy will clarify ORS 308.010, 308.057 and 308.059 and associated Administrative Rules, and will serve to establish policy for awarding continuing education credit. This policy is effective January 1, 2018, to comply with the passage of HB 2279 by the 2017 legislature.

ORS 308.010(4)(a) requires that each person who is registered as an appraiser under this section participate in a **continuing education program** that increases technical competency in the areas of:

- ✓ Basic and advanced mass appraisal
- ✓ Residential, rural, special assessment, commercial or light-industrial appraisal
- ✓ Property tax exemptions
- ✓ Personal property appraisal
- ✓ Ratio analysis
- ✓ Computer applications in the area of assessment and appraisals

Technical continuing education credit will also be awarded in the following areas:

- ✓ Farm or forest uses
- ✓ Property specific appraisal

Training for board of property tax appeals (BOPTA) Board Members is eligible for credit, however training for BOPTA Clerks is not.

Management credit will be awarded in the areas of personnel relations (hiring, discipline, dismissal); office management, communication, government ethics and management of appraisal programs.

## **CE Credit Requirements – Appraiser (non-management):**

First two-year cycle: 60 hours of technical credit.  
Every cycle thereafter: 30 hours of technical credit

## **CE Credit Requirements - Assessors/Appraisal Managers:**

First Cycle - 60 hours as follows:  
20 hours technical/20 hours management/20 hours combination tech/management

Every two-year cycle thereafter - 45 hours as follows: 15 hours technical/15 hours management/15 hours combination tech/management

If an appraiser's registration lapses they will be required to re-take the appraiser examination and accumulate 60 hours of continuing education technical credit within their first two-year cycle.

The Department will discontinue tracking credit for employees that have no statutory continuing education requirement. If you do not have a CE requirement and take courses in iLearn Oregon, a transcript of what course(s) you've taken is

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provided in iLearn. Any participant in a DOR classroom course will receive a certificate of completion upon completion of the class and passing of a test.

## **Waivers**

Waivers from continuing educations credits may be granted under the following circumstances:

- ✓ Military Service of more than six months of the year that prevents the completion of technical credit requirement
- ✓ Disability or illness that prevents the completion of technical credit requirement
- ✓ Accident or other uncontrollable events that prevent the completion of technical credits; and
- ✓ Limited duration assignments within the Department of Revenue but outside of the Property Tax Division for Department of Revenue appraisers.

Anyone requesting a waiver of continuing education credits based on any of the circumstances above must file a Request for Waiver of Training Credit in the ACED database by logging into their student account at <https://secure.dor.state.or.us/aced/>. no later than January 31 of the year after their cycle ended. The request for waiver must be filed by the registered appraiser holding the registration.

Example: Your continuing education cycle ended on December 31, 2017. You must file your request no later than January 31, 2018.

## **DOR Classroom Courses**

Priority registration will be given to students with a continuing education requirement and appraiser trainees in an official appraiser trainee program with the county in which they're employed. All others will be placed on a wait list in the order they registered. If openings occur, those on the wait list will be registered in the order they registered.

Two weeks prior to the class, participants will receive an email confirming their registration and course material. Students may download and print their own copies or view the material on their laptop or tablet in class.

## **Continuing Education Course Content**

Professional training, for the purposes of awarding continuing education credit, must contain, at a minimum, the following elements:

- ✓ The training topic must be designed to enhance competency in the areas listed above and/or related to the field of assessment and taxation
- ✓ Have defined learning objectives that increase the knowledge, skill or ability of the audience in the areas of assessment and taxation
- ✓ Content that leads the learner through the objectives as defined in the course outline.

## **Documentation and Calculating Credit**

Credit for qualifying classes will be calculated at a one-to-one ratio based on the amount of "seat time" the classes take. Thus, a two-hour class would receive two hours of continuing education credit. Partial credit will only be awarded for half-hour increments. Credit will only be given one time for the same class if it is taken more than once during the two-year cycle. Awarding partial credit for DOR classroom courses (e.g. had to leave due to an emergency or other circumstance) will be reviewed on a case-by-case basis.

In order to receive continuing education credit the student must submit to the DOR a request for training credit and documents showing proof of attendance/completion and the number of hours awarded, no later than the end of the year in which the training was taken. We would like this information to be submitted as soon as possible after the

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course is completed in order to ensure timely awarding of credit hours and up-to-date appraiser records. Requests must be submitted via the ACED database on the agency's website at <https://secure.dor.state.or.us/aced/>.

## **Meetings/Tech Groups/Conferences**

If a training session is part of a meeting, tech group, or conference, a description of what is being taught, by whom, the knowledge and/or skills the audience will receive and the training content, must be submitted to the DOR Property Tax Division, Continuing Education Program. Please allow two weeks for review and determination of what, if any, continuing education credit will be given.

## **Webinars**

Credit will be issued for webinars that meet the subject criteria listed above. A description of the webinar and proof of attendance showing the number of hours attended must be included in the request for credit. If that is not available, a statement signed by the assessor, along with the description of the webinar, must accompany the request for credit verifying attendance and the number of hours the student completed. The request must be submitted using the Appraiser Continuing Education Database (ACED) via the department's website (<https://secure.dor.state.or.us/aced/>).

## **Training/Teaching**

In order for the department to award any type of continuing education credit we must know who will be teaching and what the subject(s) will be. Continuing education credit will be issued for classes taught by the following vendors:

- ✓ Department of Revenue (DOR)
- ✓ International Association of Assessing Officials (IAAO)
- ✓ The Appraisal Institute (AI)
- ✓ American Society of Appraisers (ASA)

To award credit for training taught by parties other than those listed above, the student, trainer, or vendor must submit, no later than three weeks prior to the training, to the DOR Property Tax Division, Continuing Education Program, a description of what is being taught, by whom, what knowledge and/or skills the audience will receive, and/or the training content, for review and determination of what, if any, continuing education credit will be given.

A course instructor will receive technical credits equal to the number of hours awarded for presentation for the first training only. Credit will be given for development of course materials up to a maximum of ten credits per training cycle.

## **Change of Address**

If a registered appraiser has a change in address or employment status it must be reported to DOR within 30 days of the change in order to maintain current records.

If you have any questions concerning this policy, please email them to [continuing.education@oregon.gov](mailto:continuing.education@oregon.gov).