



PA STATE TAX COLLECTORS' ASSOCIATION  
P.O. Box 528  
Somerset, PA 15501

# **CERTIFIED PENNSYLVANIA TAX COLLECTOR PROGRAM**

**C.P.T.C.**  
(formerly known as PQMC)

**Training and Continuing Education  
2017**

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## **A. Introduction**

The Pennsylvania State Tax Collectors' Association (PSTCA) exists to further tax collectors in Pennsylvania, in part, by establishing and implementing a continuing education program that promotes compliance with state laws and efficient and effective municipal tax collections.

The Certified Pennsylvania Tax Collector (CPTC) program is designed to support uniformity in practices and applications of statutory procedures through education and training where real estate tax collectors who have earned the PQMC designation are recognized as experts in their fields.

The CPTC continuing education enrichment is a program established and administered by the PSTCA.

## **B. Education & Certification Of Tax Collectors**

1. In 2015 legislation (Act 48) was passed amending Act 164, 2014. The amended statute allows that a professional designation may be utilized by collectors and that the PSTCA may create a voluntary continuing education program for collectors who desire to achieve Certified Pennsylvania Tax Collector (CPTC) status. Tax collectors in Pennsylvania may choose to become a Certified Pennsylvania Tax Collector under an optional enrichment program administered by the PA State Tax Collectors' Association (PSTCA).

## **C. Basic Requirements**

1. To achieve this status, individuals must have taken the tax collector basic qualification class and [successfully passed the] examination or attended CPTC pre-course 1\*.  
\* collectors who have acquired 6 continuing education credits in calendar year 2015 (in compliance with Act 164) satisfy the CPTC pre-course 1 requirement.

## **D. CPTC Designation**

1. CPTC designation is not the same as a "qualified" tax collector designation, as established under Act 48. The "Qualified" tax collector program is administered by the Department of Community and Economic Development (DCED). The requirements and guidelines established under the "Qualified" tax collector program are not related to the requirements and guidelines established by the PSTCA for the CPTC designation.
2. Only those individuals who satisfy the Basic Requirements and maintain 6 continuing education enrichment credits annually may utilize the designation of Certified Pennsylvania Tax Collector (CPTC).
3. Individuals who successfully complete the required continuing education enrichment credits will receive a certificate from the PSTCA recognizing the CPTC designation for the applicable year.

## E. Maintaining CPTC Status

1. 6 continuing education credit enrichment classes will be required each calendar year, in order to maintain CPTC status.
2. Any individual that allows the CPTC status to lapse by not completing the necessary continuing education requirements must take/re-take PQMC pre-course 1 to once again become eligible to utilize the CPTC designation. PQMC pre-course will be offered each year by the PSTCA and is the equivalent of 3 continuing education credits.
  - If an individual is required to take the CPTC pre-course 1, the remaining 3 credits may be taken anytime within the same calendar year.
  - A **CPTC Pre-Course 1** class schedule will be released the beginning of each year.

## F. Continuing Education/Enrichment Classes

1. Continuing education credits can be obtained by satisfactorily completing the following requirements.
2. One hour of CPTC continuing education enrichment credit will be allowed for fifty (50) minutes of instruction
  - **1 credit** awarded each year to a collector who joins the PSTCA
  - **1 credit** awarded each year to a collector who joins and regularly attends their locally organized County or regional tax collector association meetings (attendance of 50% or more).\*
    - a. The meeting must include an educational component.
    - b. The local or regional association must be a PSTCA recognized tax collector association
    - c. proof of regular attendance must be submitted to the CPTC education committee by the relevant Association's President

\* The PSTCA recognizes the varied meeting schedule of local tax collector associations across the state. The intent of this credit option is to encourage collectors to meet locally to discuss issues of importance, to learn about modern processes regionally, and to create a network of collectors for the dissemination of information.

  - At least **1 credit** of continuing education credit should be obtained in **Law and Ethics**, to include (but not limited to):
    - a. Statutes related to the imposition and collection of taxes such as:
      1. Real Estate Tax Sale Law (RETSL)
      2. Local Tax Enabling Act (LTEA)

3. Rules of Civil Procedure
  4. Right To Know Law (RTKL)
  5. Assessment Laws or
  6. Court decisions affecting the imposition and collection of taxes
  7. County, School District and Municipal Codes
  8. Bankruptcy
  9. Ethics
- b. Any coursework not listed in this section or sponsored by the PSTCA must be pre-approved by the CPTC Education committee.
- At least **1 credit** of continuing education credit should be obtained in **Tax Office Administration and Management**, to include:
    - a. Auditing
    - b. Computerization
    - c. Accounting
    - d. Procedures for collecting taxes
    - e. Constituent Services
    - f. Public relations
    - g. Assessment
    - h. Organizational & Office Management
    - i. Banking
    - j. Best practices in tax collection
      1. Any coursework not listed in this section or sponsored by the PSTCA must be pre-approved by the CPTC Education committee.
  - **2-4 credits electives**- Can be additional coursework in "Law" or "Tax Office Administration and Management".
    - a. Any elective coursework not included in the above sections or sponsored by the PSTCA must be pre-approved by the CPTC Education committee.
3. Enrichment classes available for continuing education credit may be provided by, but are not limited to, local tax collector meetings, Northeast Regional Tax Collectors and Treasurers Association convention, Government Finance Officers Association, Pennsylvania Institute of Certified Public Accountants, Association of Government Accountants.
- a. Coursework, fulfilling all requirement categories, will be offered every year at the PSTCA annual convention.
  - b. Any coursework not sponsored by the PSTCA must be pre-approved by the CPTC Education committee.

## **G. Procedures For The Proper Recording of Continuing Education Enrichment Credits**

1. Individuals must collect, maintain and submit proof of satisfactory completion for each continuing education enrichment credit they have acquired. If credit is instructed or authorized by the PSTCA, submission of proof is not required.
  - a. When coursework is instructed or authorized by the PSTCA, an excel spreadsheet should be submitted via email for recording of credits.
    1. Spreadsheet must include collector name, Municipality, County, pstcaID, workshop ID
2. Course pre-approval is necessary for topics not listed in the Continuing Education/Enrichment Classes section (F) (Appendix IV). Adherence to the requirements outlined in the *Continuing Education/Enrichment Classes* section (F) of this booklet is mandatory. Coursework may be disapproved; if an individual has a doubt about applicability, they must seek pre-approval by submitting course syllabus to the CPTC Education Committee.
  - a. Course syllabus should include: workshop content, number of credits sought and instructor
3. All courses, whether instructed or authorized by the PSTCA, included in Section F or others, must be assigned a workshop ID number by the PSTCA Education Committee. (Appendix IV)
  - a. To obtain a workshop ID # submit a completed copy of the Workshop ID# Assignment/Pre-approval form (APPENDIX IV).
4. Proof of satisfactory completion must be obtained for each credit (appendix I-Certificate of Attendance)
  - a. A "certificate of completion" may be issued as proof to collectors for receiving credits. That may be submitted in lieu of Appendix I
5. A sponsoring organization must complete and submit a sign-in sheet for each continuing education enrichment credit. This sheet must be signed by each individual in attendance who wishes to obtain continuing education enrichment credit. (Appendix II)

## APPENDIX I

### C.P.T.C. CERTIFICATE OF ATTENDANCE

NAME: (please type or **PRINT** how it should appear on certificate)

\_\_\_\_\_

**Complete** address certificate should be mailed to:

\_\_\_\_\_

\_\_\_\_\_

Municipality (you currently work for): \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

Are you a PSTCA member: Yes \_\_\_\_\_ No \_\_\_\_\_ \* PSTCA ID# (required): \_\_\_\_\_

CLASS TITLE and WORKSHOP ID (assigned by PSTCA): \_\_\_\_\_

\_\_\_\_\_ DATE OF CLASS: \_\_\_\_\_

Length of workshop: \_\_\_\_\_ # of CPTC credits sought: \_\_\_\_\_

LOCATION OF CLASS: \_\_\_\_\_

\_\_\_\_\_

INSTRUCTOR NAME: \_\_\_\_\_

By signing below, I, the INSTRUCTOR/SPONSOR, hereby attest that the above named has attended the course listed above and seeks \_\_\_\_\_ PQMC continuing education enrichment credits in accordance with the prescribed Certified Pennsylvania Tax Collector Training and Continuing Education Program guidelines

I / we understand that false or misleading statements on my / our part on this affidavit or otherwise will disqualify the applicant from consideration for PQMC designation in the future.

SIGNATURE OF INSTRUCTOR OR SPONSOR: \_\_\_\_\_ Date signed: \_\_\_\_\_

**PLEASE RETURN TO (this form must be submitted before December 31)**

**PSTCA**

**P.O. Box 528**

**Somerset, PA 15501**

*This form should be kept by collector as proof of satisfactory completion and approval of workshop. **This form only need be submitted to the PSTCA if credits will not be submitted by sponsor.***

**\*If you are not a PSTCA member, a \$10.00 per credit fee must accompany this form**





## **Appendix III**

### **CPTC Education Committee**

A four-member committee comprised of tax collectors establishes the courses, selects and trains the course instructors, and administers examinations. This committee is also responsible for promulgating the new regulations and course schedule for re-qualification.

#### **CPTC Committee Members:**

PSTCA President, **Chair**, Sherry Labs, Plumstead Township/Bucks County  
PSTCA Secretary, Jane Miller, Somerset Twp/Somerset County  
PSTCA tax collector member- Cindy Pacansky, Fairview Twp/Erie County  
PSTCA tax collector member- Nance Sparks, North Coventry Twp/Chester County

Members are appointed by the PSTCA President.

Purpose: To plan the CPTC (Certified Pennsylvania Tax Collector) course program for tax collectors, in cooperation with the PSTCA Board of Directors, to establish and implement continuing education requirements.

Meetings: As needed, generally 1 time per year, in October at annual PSTCA convention

**APPENDIX IV**  
**Continuing Education Enrichment Credit**  
**Workshop ID assignment/Pre-Approval Form**

**WORKSHOP ID #** \_\_\_\_\_  
(assigned by the PSTCA)

Name of Workshop: \_\_\_\_\_

Location of Workshop: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Credits sought in which category: \_\_\_\_\_  
\_\_\_\_\_

# of Credits requested: \_\_\_\_\_ Date of workshop: \_\_\_\_\_

Workshop will be held from (time) \_\_\_\_\_ To (time): \_\_\_\_\_

Instructor Name/Title (list any credentials that may be applicable to coursework taught): \_\_\_\_\_  
\_\_\_\_\_

Description of workshop: \_\_\_\_\_  
\_\_\_\_\_

Name/Telephone # and email of Requester: \_\_\_\_\_  
\_\_\_\_\_

This form will be returned with a workshop ID # assigned. A sign in sheet (APPENDIX II)\*, signed by all Attendees who wish to received PQMC accreditation, must be submitted to the PSTCA Education Committee, after the coursework is completed. Continuing education credits will not be updated until all documentation is received. All approvals and sign in sheets must be received by December 31 for credit of that year. Credits do not carry over from one year to the next.  
\*If continuing education is sought individually a CPTC Certificate of Attendance, signed but the instructor, must be submitted.

Date Received by PSTCA: \_\_\_\_\_  
Received by: \_\_\_\_\_