BS&A SOFTWARE

Service, Support, Solutions...Satisfaction



SECOND QUARTER
APRIL - JUNE 2019

FINANCIAL MANAGEMENT
Accounts Payable
Cash Receipting
Fixed Assets
General Ledger/Budgeting
Human Resources
Miscellaneous Receivables
Purchase Order
Payroll
Timesheets
Utility Billing

FM ANCILLARY APPLICATIONS
Inventory Management
Work Order Management

COMMUNITY DEVELOPMENT
Building Department
Field Inspection
Business Licensing
Citizen Request for Action

ASSESSING & PROPERTY TAX SUITE
Assessing/Equalization
County Delinquent Tax
Drain Assessment
Drain Ledger
Delinquent Personal Property
P.R.E. Audit
Special Assessment
Property Tax

BS&A Online
Public Records Search
Community Development
Business Licensing
Citizen Request for Action
Employee Self Service
Financial Services

ANCILLARY APPLICATIONS
Animal License
Cemetery Management

BS&A Software to Upgrade Current Remote Support Solution: TeamViewer will be Replaced with Bomgar

Bomgar is a simple, fast, and secure remote support solution. Bomgar aids our support teams by establishing secure remote access to our customers' PCs to aid in troubleshooting. Remote sessions greatly improve our ability to provide customers fast and accurate results by allowing us to see and control their PC for a short time.

BS&A Software understands that now, more than ever, our customers are focused on the security and safety of their network PCs and files, as well as user safety. We do not take these security concerns lightly.

A remote session with Bomgar can only be started by going to our website and typing a unique session key that is provided by a BS&A Software Support Technician. Customers have total control of the remote session, and can terminate it at any time simply by closing the Bomgar application.

If you have any questions, as always, please feel free to contact our I.T. Support Team at 855-272-7638.

2nd Quarter Conference Schedule

Michigan Township Association	April 1-4
Missouri GFOA	April 10-12
Pennsylvania State Association of Township Supervisors	April 14-17
Wisconsin GFOA	April 25-26
Assoc. of County Commissioners of Georgia	April 27-29
Pennsylvania GFOA	April 28 - May 1
Georgia GMIS	April 28 - May 2
Indiana Association of Building Officials	April 29-May 2
Municipal Treasurers Association of Wisconsin	May 1-3
Minnesota City/County Management Assoc.	May 1-3
New Hampshire GFOA	May 2-3
South Carolina GFOA	May 6
Building Officials Association of South Carolina	May 5-8
Governmental Information Processing Association of Wisconsin	May 15-17
Governmental Finance Officers Association	May 19-22
Wisconsin County Treasurers Association	June 4-7
Florida GFOA	June 8-12
Building Officials of Florida	June 9-12
Pennsylvania State Association of Boroughs	June 9-12
Imagin Conference	June 9-11
Florida Association of Code Enforcement	June 11-14
County Auditors Association of Ohio	June 18-21
Wisconsin City/County Management Association	June 19-21
Georgia Municipal Association	June 23-26
Illinois Municipal Treasurers Conference	June 23-25
League of Minnesota Cities	June 26-28

Assessing/Equalization

Assessing .NET

Looking Ahead

Freezing the Assessor's Values

It is that time of year to start getting ready to print Assessment Change Notices and present the roll to the March Board of Review. Make sure that the program is on the latest version of the software so the Assessment Change Notices are up to date with the latest STC changes. It is very important to FREEZE the ASSESSOR'S values prior to printing the Assessment Change Notices, and prior to turning the roll over to the MBOR. To freeze the Assessor's Values, you MUST first run the Write Floating Values tool for ALL RECORDS. Once that is done, go to *Program Setup>Database Setup>Governmental Units*. Click the *Options* tab, then click the *Calculation Options* button. You can also set the FREEZE PERSONAL VALUES at this time, although most users wait to do this until most of the notices have come in.

Freezing the MBOR Values

After the March Board of Review has been completed and all changes have been entered, you MUST run the Write Floating Values tool for ALL RECORDS. Once this has been done, go to *Program Setup>Database Setup>Governmental Units*. Click the *Options* tab, then click the *Calculation Options* button. Set all three Freeze fields to "Freeze MBOR Values."

This will LOCK in those MBOR values so that any changes made affecting values will NOT change those values in the database. PRE changes can still be made in the program once the MBOR Values have been frozen. These PRE changes can be made up until the June 1st deadline. Shortly after the June 1st deadline, the L-4025 report should be run, as well as a Misc/Stats report.

Rolling Over the Database

Once the totals have been verified, the database is ready to be rolled over to the new assessment year. Go to *Help>View Documentation>Manual*. Search for "rolling over," then click the link for Roll Over Checklist.

EMPP

A reminder that even if your municipality has no EMPP parcels, the EMPP Export to the State MUST be run and submitted for every municipality. This allows the Department of Treasury to track which municipalities still need to submit exports. Because of the tight timeframe imposed by the Department, we strongly suggest that you run the export at the close of the MBOR. The State will be contacting those municipalities that fail to submit the EMPP Export to the State.

Tax Suite

Tax .NET

Looking Ahead

2019 Summer tax billing is just around the corner. Keep in mind that taxpayers have until June 1st to request a Principal Residence Exemption. It is our recommendation that you not take data for a new database from the Assessor until they have all the PRE changes entered in their Assessing database. This will help with the balancing process as you prepare the tax roll. For our customers who prepare their own tax rolls, you can find our **Summer Billing Checklist** on our website by going to bsaoftware.com and clicking on *Support>Assessing & Property Tax*. Scroll down the page, click *Tax Suite Help Docs*, and select *Summer Billing Checklist*. This document has been created by BS&A as a suggested guide to set up your summer tax roll and prepare for printing summer tax bills.

While not all of the items in the checklist may apply to your municipality, and perhaps there are things your municipality needs that are not listed, we do feel this is a comprehensive list to review.

A couple of the most critical points are:

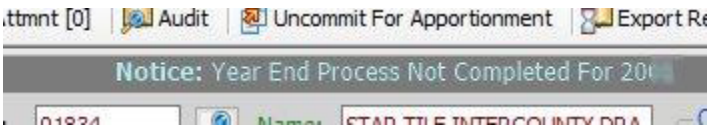
- Make sure that the 2019 Original Assessed Value, Taxable Value, PRE, and Non-PRE Values all balance to the Assessor's data. If you start the year with balanced original values, you will have fewer issues balancing throughout the year and at settlement.
- **Verify Millage Rates**. New databases are created through the New Tax Year Database Wizard. This wizard brings forward the Tax Names and Millage Rates from the previous year. It is extremely important to review the rates and compare them to the L-4029 Reports you should receive from each taxing authority. Add any new rates, delete any expired rates. Once you have all the rates entered and reviewed, be sure to have others also review the rates. It never hurts to have a second set of eyes.
- Print or export **sample tax bills** from each millage table type - to review items such as millage calculations, dates, typos, return address, field placement, etc. Note: the program no longer prompts for the PRE Savings message when printing the Standard Laser bills. The PRE Savings message is now a selection in Report Options.

Delinquent Tax .NET

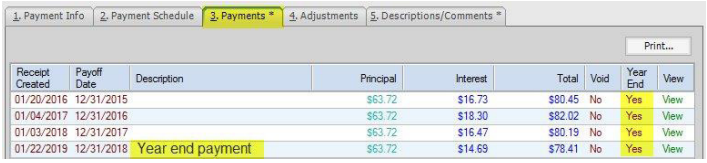
Many of our County Treasurers are now using a web service interface which sends Redemption Certificates, Forfeiture Certificates, and a handful of other documents electronically to the Register of Deeds. This eliminates the need to print and store paper documents, which will save both time and money for the Treasurer's and Register of Deeds offices. The direct export to Register of Deeds is a custom feature in the Delinquent Tax program for each county. If you are interested in pursuing a direct export of these documents to your Register of Deeds, please contact BS&A for more information.

Drain Assessment .NET

As you begin to prepare your drain assessment rolls, be sure to confirm that the 2018 year has been completed. One quick way to see if the year has been advanced is from the Project Master View. There should be a scrolling message across the top of the page indicating a previous year end was not completed.



Additionally, you can go to the Payment tab on a parcel record to determine if previous payments or year-end payments have been recorded. The payment description will indicate year end payment and the Year End column will display Yes if completed.



Receipt Created	Payoff Date	Description	Principal	Interest	Total	Void	Year End	View
01/20/2016	12/31/2015		$63.72	$16.73	$80.45	No	Yes	View
01/04/2017	12/31/2016		$63.72	$18.30	$82.02	No	Yes	View
01/03/2018	12/31/2017		$63.72	$16.47	$80.19	No	Yes	View
01/22/2019	12/31/2018	Year end payment	$63.72	$14.69	$78.41	No	Yes	View

Financial Management

General Ledger .NET

Looking Ahead

Year End Rollover

As a reminder for municipalities with a fiscal year end date of September 30th, the year-end rollover process will need to be completed before March 31st to prevent any posting date errors in the BS&A application. You can find helpful instructions on the GL Year End Rollover Process in the online help manual, courseware, and videos, all accessed through the Help menu in the application.

Municipalities with a fiscal year end of December 31st will need to complete this process before June 30th.

Save the Date

During the week of July 29, 2019, BS&A Software will be hosting an Upper Peninsula Regional User Group Event at the Holiday Inn in Marquette! Sessions will be available in the following areas: Financial Management, Payroll/HR, and Utility Billing. This event is free of charge. Additional details and registration will be available soon.

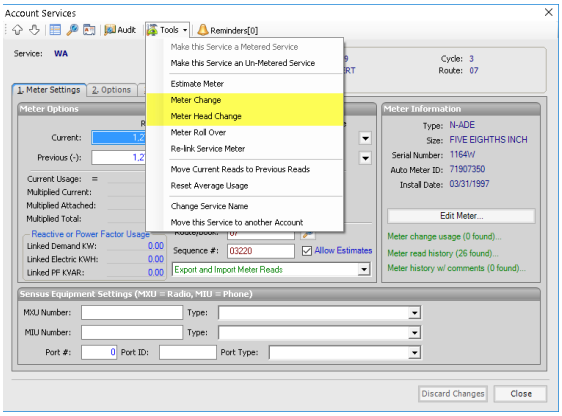
Utility Billing .NET

Feature Highlight

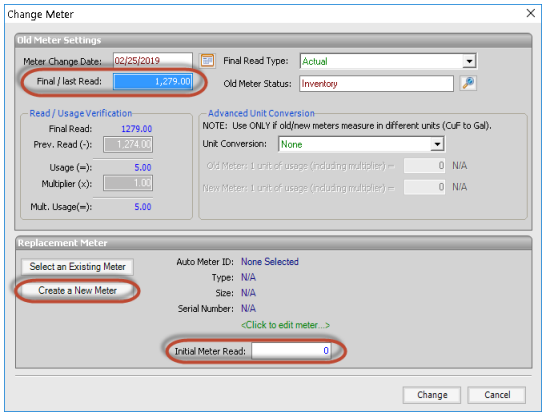
Meter Change vs Meter Head Change

The functionality of a Meter Change and a Meter Head Change are very similar. They are both a way to "discontinue" the old meter and start a new meter/meter head at a property.

Go to the Services Screen and double-click the service being changed. Go to tools and select the option you are looking for.

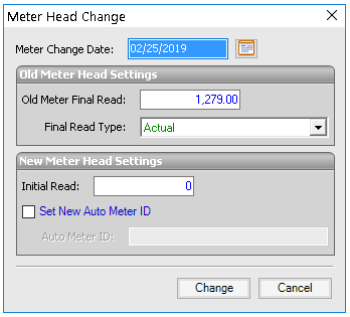


A **Meter Change** is done when the entire meter has been replaced at a property. When completing a meter change in Utility Billing, be sure to verify the final read on the old meter. (This can be changed prior to the journalization process for billing if it is found there was an error entering this.) The meter change date defaults to the date that the change is initiated in UB. Please verify that this date is correct according to your information. Typically, a new meter is installed rather than one from inventory, so



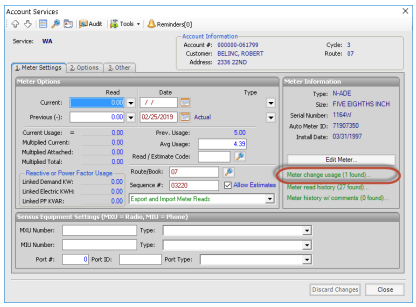
we suggest you select "Create a New Meter." This will allow you to enter all of the new meter information on a separate screen (Meter ID, Serial Number, Meter Type, etc.). If a new meter is installed, it is very likely that the initial read is 0. If you are using an existing meter during a change, please double check that the initial read matches the meter that was installed.

During a **Meter Head Change**, only a small portion of the meter is changed out. This requires an ending read from the old meter head and an initial read from the new meter head. The Meter Change Date will default to the date it is initiated in UB, but can be changed to reflect the paperwork received. A match with the old meter should be verified, but again, that figure can be changed should this have been entered incorrectly up until the point the bills have been journalized. The initial meter read ties to the new meter head, and should be verified. Assuming this is a brand new meter head, the initial read will be 0. If a new Auto Meter ID is required on the new head, please check Set New Auto Meter ID and enter the new number.

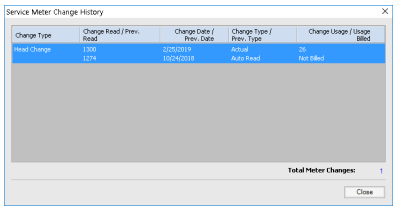


If you have completed the meter change or meter head change and realized that your final read on the old meter was incorrect, please follow the steps below to correct the final read:

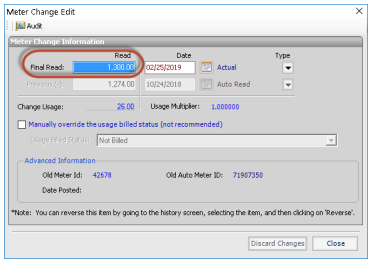
1. *Services*>double-click on the affected service.
2. Under Edit Meter on the right, click the green link labeled Meter Change Usage.



3. Double click on the Meter Change you need to correct.



4. Re-enter the correct final read.



5. Click Close.

Reversing a Meter Change/Meter Head Change

If you noticed that you have performed a Meter Change/Meter

Head Change on the incorrect account, it is a simple reversal from the History screen. Right-click on the line that shows Meter Change or Meter Head Change, then select Reverse. This will take care of the reads and the replacement of the old meter with the new meter on the account.

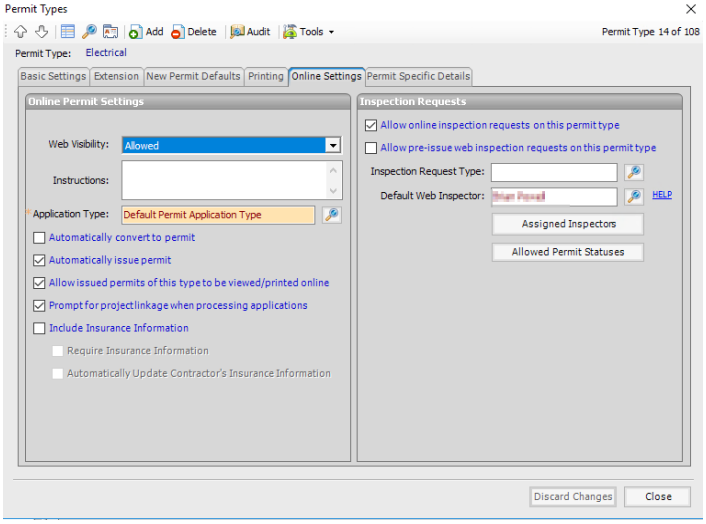
Community Development

Building Department .NET

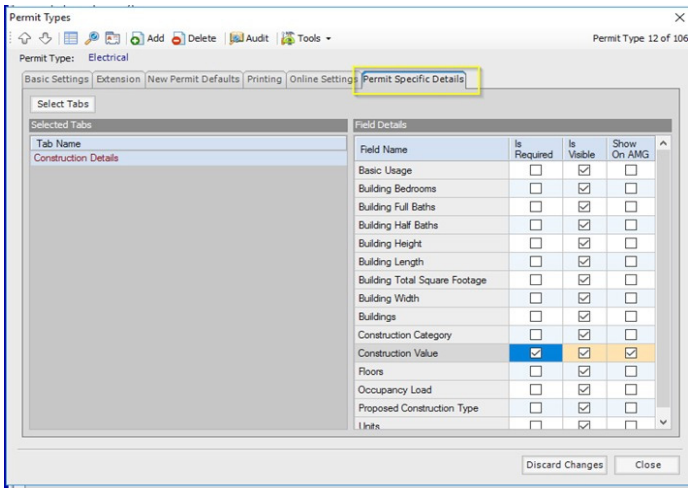
Upgraded Permit Application and Inspection Scheduling

A new version of BS&A Online – Community Development functionality has been released. The look, feel, and overall processes remain mostly the same, but include some added features and upgrades such as….

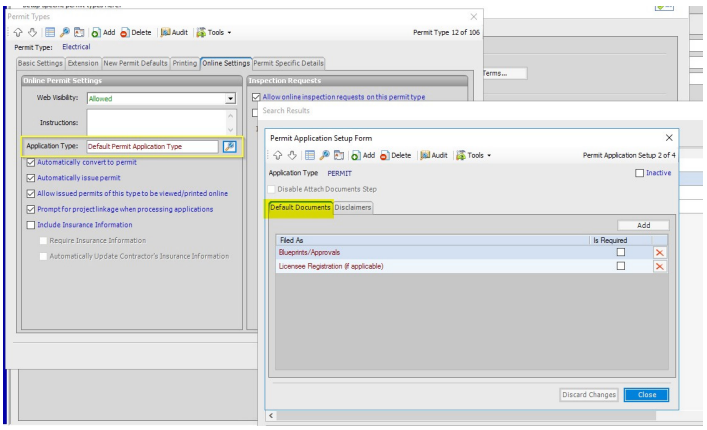
- **Performance improvements which no longer require the web page to re-load when a change is made**
- **Additional permit customization**
  - An "Instructions" section is available, allowing you to list custom text for each different permit type.
  - Ability to mark permits as "Disallowed," along with a Reason .
    - Rather than simply marking a permit type as Hidden, it can be changed to Disallowed and an explanation can be given as to why that permit cannot be submitted online.
      - This is done to discourage applicants from shoe-horning a permit they want into a different, incorrect permit type.



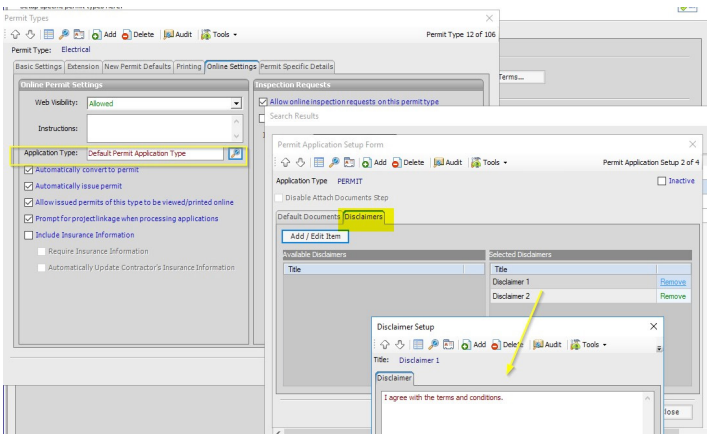
- **Select specific permit fields to show and/or be required (this can be done for BS&A Online only, or within the desktop application, or both)**
  - For example, when entering a new permit, the Construction Value can be made to be required.
    - This is found under the new Permit Specific Defaults tab. This looks and works just like the PZE tabs/fields.



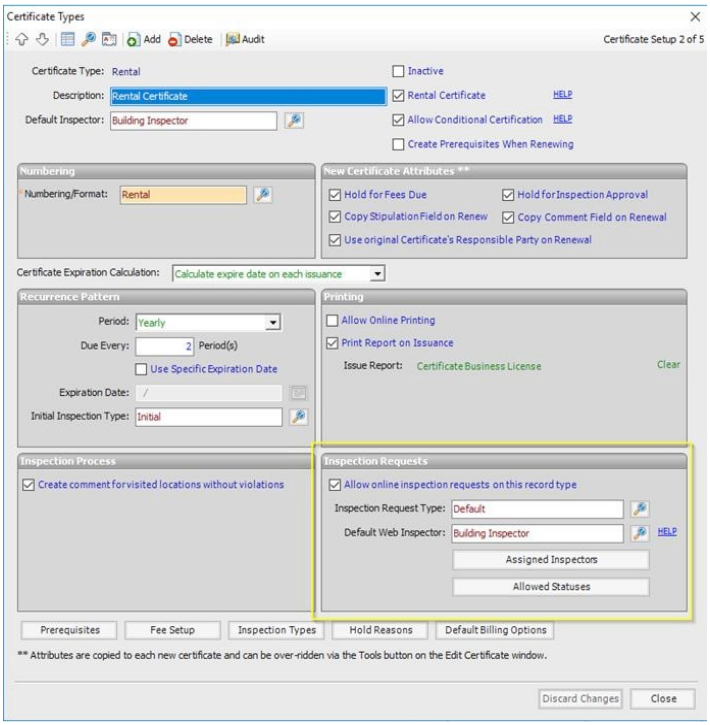
- **Pre-set default documents to include on any permit application**
  - Rather than having an open-ended "Attachment" step, users can now create slots for the specific documents they want, and mark specific ones as required.
  - This works just like Documents on PZE.



- **Optional Disclaimer when submitting permit applications or inspection requests.**
  - These are customized sections at the very end of the process that must be checked in order to proceed.



- **Ability to schedule inspections on any record type (permits, enforcements, certificates, and CofOs)**
  - Found under each record type in a new "Inspection Requests section."



- **Improved inspection scheduling calendar now shows additional details for each given day**

Business Licensing .NET

"Cancel If Not Paid By" and "Renewal Date" fields

The "Cancel If Not Paid By" and "Renewal" Dates have been hidden from the program by default.

These dates are left over from an earlier version of the software, but aren't used by a majority of users. For this reason, with a goal of reducing clutter and confusion in the program, they have been hidden. If needed, these fields can be re-enabled. Go to *Program Setup>2. Program Settings>General Settings>License Settings tab*. Turn off the "Hide Renewal date from License view/wizard" and "Hide Cancel if Not Paid by date from License view/wizard."

Option to lock business information from editing

When enabled (found under *Program Setup>2. Program Settings>General Settings>General Options>Required Edit Mode to modify Businesses*), no business information can be edited unless the Edit button on the top toolbar is selected first. This prevents important information from being unintentionally changed while navigating the database.

This option is disabled in all databases by default.

CD Chicagoland Regional User Group

Just a reminder that the CD Chicagoland Regional User Group Event (originally scheduled for January 31, 2019) has been rescheduled for Tuesday, March 26, 2019. The user group is scheduled to begin at 9:00 AM at the Civic Center, 8040 S. 6th Street, Oak Creek, WI.

For those registered, BS&A will be re-scheduling you to attend this event on your behalf. If, for whatever reason, you are no longer able to attend, please let us know as soon as possible, and we will cancel your reservation for you. We look forward to seeing you soon!

Team Spotlight

HRMS Support Team

On a daily basis, our Human Resource Management Systems (HRMS) Support team assists our customers – by phone or email – in using the entire suite of HRMS applications. The HRMS suite consists of: Payroll (PR), Human Resources (HR), and Timesheets (TS). Our main focus in support is to provide unparalleled customer service to all of our municipal customers by teaching them the application processes, as well as assisting with many of their daily functions to help them get their jobs done.

Outside of helping customers over the phone and by email each day, the HRMS Support team works hard on other projects that benefit not only our customers, but other teams within BS&A. Many examples of these additional projects include:

- Michigan-based and out-of-state User Group and User Conference coordination and communication
- Leading Michigan-based and out-of-state User Group and Annual Conference sessions
- Mentoring new and existing team members who are learning about HRMS
- Onsite and remote trainings as needed, to assist the Implementation and Training team
- QA (Quality Assurance) team rotations to help test new features and updates to the applications
- Leading internal classes each year to update all team members on tax law changes, 941 balancing and year-end W2 processing, as well as other topics related to payroll and human resource reporting.
- Creation of internal and external learning materials such as courseware videos and documentation, helpful step-by-step guides, and study guide resources for new Support team members
- Additional consultation and research time after a call or email exchange has been completed. Many times, the Support team member will do additional research on a customer issue, question, or new feature request.

Each year as we grow, the support call and email volume picks up substantially. We have been able to master providing unparalleled customer service to all of our customers, while maintaining an elite staff comprised of highly educated individuals who have a strong work ethic and a desire to continuously succeed. The busiest month and time of the year for HRMS support is the month of January, due to helping our many customers balance their quarterly reports, print W2s, and close out their payroll year. The team is very proud of their ability to not only maintain our unique culture and provide unparalleled customer service, but to do so with a high call volume and impressive response time averages.

Technical Support

We encourage you to utilize our Help Menu feature in all .NET applications to either send a call-back request or an email request to the support team. All requests will continue to be answered or returned within the normal turn-around time that our customers are accustomed to.

Alternatively, regular email requests are also encouraged. Both options are especially useful for those customers who do not work in their offices each day during regular business hours.

Please keep in mind not all situations can be handled through email. Occasionally we may need to speak with you.

Assessing	ASGSupport@bsasoftware.com
Tax	TaxSupport@bsasoftware.com
Delinquent Tax	TaxSupport@bsasoftware.com
Delq Personal Property	TaxSupport@bsasoftware.com
Special Assessment	TaxSupport@bsasoftware.com
Community Development	CDSupport@bsasoftware.com
Utility Billing	UBSupport@bsasoftware.com
Financial Management	FMSupport@bsasoftware.com
Payroll/Human Resources	HRMSSupport@bsasoftware.com
BS&A Online	ITSupport@bsasoftware.com
I.T. Team	ITSupport@bsasoftware.com

Sending Data to Support

The easiest, most efficient way to send BS&A data is to use our FTP process. This works for both Pervasive and .NET:

1. Back up your database.
2. Go to ***Help>FTP>FTP File to BS&A Software***.
3. For .NET, **File to Upload** defaults to the backup file you just created; click **Ok**. For Pervasive, you will need to browse to the backup file; do so and click Send.
4. For .NET, go to ***Help>Contact Customer Support>Email Support***. For Pervasive, go to ***Help>Email [deptname] Support***.
5. For .NET, verify the information in the Subject line (your license file and version date information). For Pervasive, enter a Subject.
6. In the body of the message, notify us of the FTP upload, and be sure to add your name and a contact number.

Should you need to send data via regular mail, please remember to note on your envelope or enclosure the team or person that has requested the data. It is also important to label the media. Our goal is to serve you as quickly as possible and unlabeled items could cause a delay in that process.

Annual Service Fees

Your Support Agreement, which covers program updates and technical support, guarantees that fees will not change for the first two years that your municipality uses our software. After that time we reserve the right to increase fees by the cumulative Consumer Price Index. Therefore, if you were a new customer in 2017, your 2019 Support Fee will increase no more than 3%. This does not apply to upgrades to the .NET applications where fees are increased by the annual CPI.

Assessing Classes

Level I - Program Introduction & Setup

Recommended for the Assessor or designated new user of Assessing/Equalization. This class covers all master list setup in Program Setup and its importance in data entry and reporting. Roll balancing and frequently-used reports are also covered.

Level II - Assessment Roll & Data Entry

This class demonstrates how to perform the assessment roll including name/address changes, sales, uncapping, P.R.E.s, building permits, and processing splits/combinations. Entering all types of appraisal information is also covered.

Level III - Land Tables, ECFs & Sales Studies

Designed for the user that will be responsible for creating/maintaining land rates, analyzing/setting ECFs, and performing sales studies. This class also reviews related reports for each of these features.

Level IV - Assessing Cycle & Special Acts Parcels

This class reviews the entire assessment cycle, beginning with creating a new assessment year database, rolling over the database, and processing all types of adjustments through end of assessment roll review (necessary prior to sending Change Notices). As a part of this class, Special Acts parcels are reviewed with ideas and reports that are useful for managing special rolls.

Using Apex with Assessing/Equalization

This class covers the use of Apex (latest version available) with Assessing/Equalization .NET. Setup within Assessing/Equalization is covered, along with frequently-used commands. Practical examples of drawing buildings and land are also given.

Assessing .NET Personal Property

This class is designed for Assessors, Appraisers, and other office staff who perform duties pertaining to the processing, data entry, and reporting of Personal Property. Topics discussed in detail are printing of the personal property statements, processing statements, assessing buildings on leased land, estimating assessments for non-filers, and Board of Review changes.

Commercial/Industrial

This class covers the details of inputting Commercial/Industrial structures into Assessing .NET. Examples of Calculator, Segregated, Unit-in-Place and Income Capitalization are used.

Assessing .NET Report Designer

This class introduces users of Assessing .NET to the features and functions of the new Report Designer. Sample custom reports will be created in class, along with instruction on creating and using filters and queries.

Land Value Modeling

This one-day class begins at square one: how to create land tables and how to attach parcels to those land tables, both one-at-a-time or en masse using tabular and GIS methods. This class also illustrates how to populate essential fields in order to analyze the market value of land using a number of different units of measurement: per acre; per actual front feet; per effective front feet; per square foot. Buildable units and site value are also taught. Finally, you will learn how to utilize land-to-building ratio and land residual techniques using BS&A's Assessing program.

Using GIS

This class covers the GIS tools available in our .NET applications. Among other things, you will learn how to: create land value maps; identify parcels within x feet of subject parcels; display a wide range of fields on a map; use maps to set data fields en masse; include blocked and marked data on a map; put sales data on maps; use GIS map routes for field inspections done in conjunction with sales and permits, or on parcels in general.

Tax Classes

Level I - Introduction & Creating a Tax Roll

Recommended for the Treasurer or person creating their first tax roll using Tax .NET. This class includes a thorough program overview, as well as general setup and tax setup items relevant to creating a tax roll. Importing from Assessing .NET, developing a tax roll checklist, and establishing millage rates for all billing types is also covered, as well as working with mortgage information and reviewing options for adding special assessments to the tax bill. A review of the reports available for balancing purposes and tax bill printing through out the roll setup is presented.

Level II - Working with the Tax Roll

Designed for any Tax .NET user working with an existing tax roll throughout the course of the collection cycle. Roll maintenance such as name/address updates, mortgage codes, deferments, and handling taxpayer inquiries is covered. This class also includes payment processing, adjustments, and roll balancing with reports related to each item.

Special Assessment

Program setup and creating a multi-year, principal/interest type of Special Assessment District with various benefit calculation methods is covered. Creating a separate billing for special assessments and/or billing the annual installment on a current tax bill is also reviewed.

Delinquent Personal Property

Designed to acquaint new users with Delinquent Personal Property .NET. Topics discussed in detail are initial setup, importing parcels from shared tax database, data entry, generating reports, entering general ledger account numbers, and receipting. Also discussed is the built-in Report Designer.

Tax .NET Report Designer

This class introduces users of Tax .NET to the features and functions of the new Report Designer. Sample custom reports will be created, along with instruction on creating and using filters and queries.

Community Development Classes

Basic Program Usage

This lecture style class covers the basic features of Building Department .NET. Participants will be introduced to the layout of the program, along with the fundamentals of program management and data entry.

Advanced Program Usage

This lecture style class covers the advanced features of Building Department .NET. Participants will be introduced to record type setup (including PZE processes), workflows, program security, and table filtering along with other administrative areas of the program.

Building Department .NET Report Designer

This interactive class takes the user through the theory, design, and functionality of your powerful new reporting tool. Each user gets interactive, hands-on experience with a knowledgeable instructor, walking them step-by-step through the process of creating basic reports and data filters. This class is designed for the new .NET user who wants to get the most out of their new software. You will have the opportunity to work with data and text fields, learn about data relationships, and create a report of your own.

Financial Management Classes

Intro to Governmental Accounting 1.0 Using BS&A Software

This hands-on, classroom style class is designed for anyone wishing to grasp the basic concepts of fund accounting and how those concepts are applied within the BS&A General Ledger application. Main topics include:

- Fund Accounting
- Fund/Department/Account Definitions
- The Accounting Equation
- Uniform Chart of Accounts
- Project and Grant accounting
- Report Profiles
- Budgeting

Intro to Governmental Accounting 2.0 Using BS&A Software

This hands-on, classroom style class is designed for anyone wishing to grasp the intermediate concepts of fund accounting and how those concepts are applied within the BS&A General Ledger application. It is recommended that those attending the 2.0 class have a basic understanding of introductory fund accounting concepts and some experience in the BS&A financial management applications. Main topics include:

- Banking Setup and Reconciliations
- Pooled Cash
- Deposit Creation/Interest Allocation
- Financial Statements
- Interfund Activity
- F-65 Reporting

6-Hour Continuing Education Credit

All Assessing & Tax Classes listed are hands-on and held at BS&A's training facility. The State Tax Commission has approved these elective classes for 6-hour continuing education credit.

2nd Quarter, 2019

Register for classes Click on the class name in the calendar below or visit our website at http://www.bsasoftware.com/News-Events/Upcoming-Events

Retake a class for free! If you would like to brush up on recently learned skills, you may retake the same class within 6 months free of charge if space is available. Call for details.

April

Monday	Tuesday	Wednesday	Thursday	Friday
1	2	3	4	5
8	9 Assessing .NET Level IV	10	11	12
15	16	17	18	19 Closed @ Noon Good Friday
22	23	24	25	26
29	30			

May

		1 Assessing .NET Level II	2 Assessing .NET Level III	3
6	7	8	9	10
13	14	15 Intro to Governmental Accounting 1.0 (Use BSA)	16 Intro to Governmental Accounting 2.0 (Use BSA)	17
20 Building Department .NET Basic Program Usage	21	22 Tax .NET Level I	23 Tax .NET Level II	24
27 Closed Memorial Day	28	29	30	31

June

3	4	5	6	7
10	11 GIS (using Assessing .NET)	12	13	14
17	18	19	20	21
24	25	26	27	28

Class Times
Each class is one full day from 9:00 a.m. - 4:00 p.m. with an hour lunch break, unless otherwise noted.

Fees/Invoicing
Classes are $205/person and include lunch, unless otherwise noted. Please do not send payment until you are invoiced.