2024 Education Schedule

for Corptax

Contents

Product Training Information

CSC offers a wide selection of courses for both the new and advanced users, most of which are eligible for CPE credit. Sessions are taught by experienced trainers and designed to help address real-life issues through case studies and hands-on exercises.

We offer many convenient learning options to help address your learning needs on your terms:

- **Webcasts.** View free live webcasts or our library of on-demand webcasts over hot topics. The webcasts are designed to help you learn and work more efficiently.
- **Online Training.** Online instructor-led sessions provide detailed learning on specific subjects without having to leave your office.
- **Self-Study.** Online product training courses that are available on demand from our recording library, including interactive videos. Once you register, you will have access to the recording and the corresponding session documents for 30 days.
- **Classroom Training.** Immerse yourself in instructor-led sessions. Sessions are limited to a small number of participants to allow for individual instruction and knowledge-sharing. Visit our primary locations in the Chicago area, Dallas/Fort Worth area, or San Diego.
- **Onsite Training.** Experienced members of our training team will travel to your office and deliver a comprehensive training agenda designed to your specifications. Complete the onsite request form for more information.
- **Corptax Certification.** Earn credentials to be recognized as a certified Corptax user. Each certification examination includes a knowledge exam and a case study to certify mastery of skills.
- **Conference.** Attend CONNECT for networking and learning about all things Corptax.

Training Locations

Chicago Area	Dallas/Fort Worth (DFW) Area
2100 E. Lake Cook Road	4400 State Highway 121
Suite 800	Suite 500
Buffalo Grove, IL 60089	Lewisville, TX 75056
847.236.8000	972.677.4200

All online courses and classroom sessions in the Dallas/Fort Worth and Chicago areas are listed in Central Time (CT). San Diego, CA classroom sessions are in Pacific Time (PT).

Continuous Education Subscription

One low price for a Continuous Education Subscription (CES) entitles you and your entire team to take advantage of continuous learning! The CES provides access to many online and classroom training sessions* for all licensed users at your company.

Note: Courses in this schedule that are included with the Continuous Education Subscription include the following indicator: CES

Each session outlines learning objectives to improve your product usage and efficiency. With more than 100 sessions to choose from, you will find the right course for your business needs. Online sessions include self-study and live-instructor options. Classroom sessions offer hands-on learning and take place in our Chicago, Dallas/Fort Worth, or San Diego locations. Access is easy—just log in to CSC Connections and select the session of your choice from the **Learn** area. The subscription pricing activates when you log in. Your subscription term mirrors your product renewal cycle, streamlining the approval process.

Contact your Account Manager or CRM today and get all the details on this great opportunity for your company.

CPE Information

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits will be granted based on a 50-minute hour. CPE is available for most live training sessions, but please check the training details in the Education Schedule for the official amount of CPE credits for each session.

Corptax, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

NASBA National Registry of CPE Sponsors – Sponsor License Number 108611
Texas State Board of Public Accountancy – Sponsor Number 009498

In accordance with the National Association of State Boards of Accountancy (NASBA) standards, course evaluations will be distributed at the end of the event.

Registration Information

A full listing of course offerings is available by visiting CSC Connections. Please review the training details, including descriptions, price, and available CPE credits, for a course by browsing from the list of upcoming sessions or typing in the name of the course in the **Search** field.

To register, you must complete the online registration form including the payment processing:

1. Log in to Connections.
2. Click **Learn**, **Learn Home**.
3. Explore training opportunities by course type or product.
4. Locate the desired course and click **Register**.
5. Select **Complete Registration Now** or **Add to Cart and Complete Registration Later** to continue shopping and checkout via the cart when ready. **Note:** Your spot in a class is not reserved until you complete the checkout process.
6. Verify the class and price.
   - If you have a discount code, enter it into the **Discount Code** field and click **Apply Discount**.
   - If you have a training subscription, the price reflects what is included in your subscription.
7. Enter your payment information and click **Place My Order**.
8. Click **Printable Receipt** on the Registration Complete page to print your receipt. You can also access course information and handouts from this page.
9. Click **View Product** to access course information and handouts from this page.
10. Click **My Learning** to access your registered courses.

Cancellation Policy

- Cancellations up to three days prior to a scheduled classroom session will result in a withdrawal fee per registrant.
- Cancellations up to three days prior to a scheduled online session will result in a withdrawal fee per registrant.
- Cancellations within three days of any session and no-shows will be charged the full session fee.

We reserve the right to change the session fee and modify, reschedule, or cancel sessions at any time prior to the session start time. If we cancel a classroom session for which you are registered, you will receive a cancellation email three weeks prior to the session. If we cancel an online session for which you are registered, you will receive a cancellation email one week prior to the session.

To cancel your session for either a Classroom or Online session:

1. Log in to Connections.
2. Create a case and select **Training** as the Product. Include the session date and title in the case details.

Additional Information

Please contact us at education@corptax.com for more information regarding course content, pricing, delivery methods, or CPE; to inquire about our refund and cancellation policy; or if you have any other questions.

Alphabetical Listing of Courses

Throughout this schedule, you can view courses based on their product area. Use this list to locate courses based on their name or type. Click a course name below to view full course details.

Types

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Course	Types					
	O	C	S	S+	CES	CCP
Administration and Security in Corptax Web—Setup	●				●	●
Automating Your Processes Using Corptax BOTS	●		●		●	●
Corpsales—Advanced		●			●	
Corpsales—Basic		●			●	
Corpsales Process Training	●				●	
Corptax Administration—Enhance Your Troubleshooting Skills	●				●	●
Corptax Administration and Security—The Maintenance Life Cycle	●				●	●
Corptax Basic Insurance Series	●				●	●
Corptax Calendar	●				●	
Certification Prep: Corptax Certified Professional—International Compliance		●			●	●
Certification Prep: Corptax Certified Professional—Pass Through Compliance		●			●	●
Certification Prep: Corptax Certified Professional—Provision		●			●	●
Certification Prep: Corptax Certified Professional—U.S. Compliance		●			●	●
Corptax Database Connections	●				●	●
Corptax e-File for Foreign Bank Account Report (FBAR)	●		●		●	●
Corptax e-File Processing			●		●	
Corptax Groups and Post Amounts Simplified	●				●	●
Corptax International Compliance: Form 5471 Basic Series			●		●	
Corptax International Compliance - Preparing Form 1118 Workshop Series	●		●		●	●
Corptax International Compliance – Review of GILTI and FDII Form Data Workshop Series	●		●		●	●
Corptax International Foreign and Domestic Processing for the Intermediate User	●				●	●
Corptax Partnership—Advanced Series	●				●	●
Corptax Partnership e-Filing	●				●	●
Corptax Provision Federal Series			●		●	
Corptax Provision Workshop Series for Intermediate Users	●				●	●
Corptax Tax Contingency	●				●	●
Corptax U.S. Compliance—Basic Federal and State		●			●	●
Corptax U.S. Compliance—Basic State Series	●			●	●	●
Corptax U.S. Compliance Federal Considerations			●		●	

Alphabetical Listing of Courses

Course	Types					
	O	C	S	S+	CES	CCP
Corptax U.S. Compliance: Filing Federal Amended Returns	●		●		●	●
Corptax U.S. Compliance: Filing State Amended Returns	●		●		●	●
Corptax U.S. Compliance - Intermediate Federal Topics	●				●	●
Corptax U.S. Compliance: Intermediate State Topics	●				●	●
Corptax U.S. Virtual Account – Net Income Per Books (Demo)			●		●	
Corptax Web Reporting	●				●	●
Data Management Using Corptax Query Tools	●				●	●
Discover Corptax Data Collect Possibilities	●				●	●
Electronically Filing Form 7004 in Corptax	●				●	●
Explore Microsoft Excel Features	●				●	
Federal e-Filing Using Corptax (NEW)	●		●		●	●
Hands-on Federal e-Filing Using Corptax (NEW)		●			●	●
How to Master Corptax Amount Import	●		●		●	●
International Compliance Processing Using Corptax		●			●	●
International Compliance Using Corptax – Maintaining Your Profiles for the Experienced User	●				●	●
International Compliance Using Corptax Next Gen or Legacy Methods to File Form 5471 Workshop Series	●		●		●	●
Introduction to Corptax			●		●	
Introduction to Corptax Office	●		●		●	●
Introduction to Corptax Provision for New Users	●		●		●	●
Jumpstart your GMT Planning with Corptax Global Minimum Tax	●				●	●
Leverage Corptax Data with Microsoft Excel Features	●				●	
Managing Documents with Corptax DocManager			●		●	
Managing Entity Data Using Corptax Entity Properties and Views	●				●	●
Managing Entity Structures Using Corptax Ownership and Query Groups	●		●		●	●
Maximize Corptax Provision Capabilities	●				●	●
Mixed Returns Using Corptax	●				●	●
Next Level Automation with Corptax Office	●		●		●	●
Next Level Corptax Data Import	●				●	●
Preparing and Reviewing Corpsales Returns	●				●	
Preparing Form 8865 Using Corptax International and Partnership Series	●				●	●
Preparing K-2 and K-3 in Corptax	●		●		●	●
Preparing Provision in Corptax		●			●	●
Reporting for Disregarded Entities Using Corptax Automated Form 8858	●				●	●
Resolving e-File Errors in Corptax	●		●		●	●
See the Big Picture with Corptax Visual Org	●				●	●
Setting Up Automated Adjustments Using Corptax Web Workshop	●				●	●

Course	Types					
	O	C	S	S+	CES	CCP
State e-Filing Using Corptax	●		●		●	●
Understanding Corpsales Process and Profiles	●				●	
Understanding Corptax Fundamentals for International Compliance Workshop Series	●			●	●	●
U.S. Compliance Using Corptax—Basic Federal Series	●			●	●	●
Using Corpsales Amount Import and Query Tools	●				●	
Using Corptax Automated Adjustments to Enhance Your Processes	●				●	●
Using Corptax for Your Base Erosion and Profit Shifting Reporting (BEPS)	●				●	●
Using Corptax International Reports for Your Domestic Process	●				●	●
Using Corptax International Reports for Your Foreign Process	●				●	●
Using Corptax Office with Your International Data	●				●	●
Using Corptax Office with Your Provision Data	●		●		●	●
Using Corptax to Setup Workflow	●				●	●
Using Corptax U.S. State Planner	●		●		●	
Using Microsoft Excel PivotTables and Power Pivot Add-in for Corptax Analytics	●				●	
Using Power BI Desktop with Corptax Data	●				●	

Corptax BEPS and Global Reporting Track

Using Corptax for Your Base Erosion and Profit Shifting Reporting (BEPS)

O **CES** **CCP**

Use Corptax BEPS CbC to meet your Country-by-Country (CbC) reporting requirements. Leverage data already in the system to help automate your global compliance needs.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate

Course Number: 06-70100
Prerequisite: None
Advanced Prep: None

Duration: 5 hours
CCP Eligible: Yes

Course Dates:
- April 17

Individual Modules

Course Number:
06-70100-1
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

Corptax Overview and Setup: Need to know how to get started using Corptax for your BEPS process? Learn what is required to build your BEPS process in Corptax. Then use, create, and/or modify setup items needed for BEPS purposes.

Objectives:
- Discover the required setup for the BEPS process in Corptax
- Demonstrate how to create an entity and complete the information necessary for BEPS
- Examine how to set up and classify an account for BEPS purposes
- Make use of workflows and packages to assist you in the BEPS process

Course Number:
06-70100-2
Course Time:
1:00 PM–2:00 PM CT
CPE: 1

Data Import: Know how to get your data into Corptax to use for BEPS? Identify different data types to use for BEPS. Then learn how to use your trial balance data as a starting point or as the way to import and use detailed transactional data for your BEPS process.

Objectives:
- Identify the major steps of the data import process
- Construct an import package and connector to import trial balance data to use in BEPS
- Discover how to import transactional data into subledgers for use with the BEPS product

Course Number:
06-70100-3
Course Time:
2:30 PM–4:30 PM CT
CPE: 2

Country by Country Data Collection and Reporting: Want to know how to review or modify the data you imported and view the BEPS reports to modify them to meet your needs? This session reviews the Table 1 and Table 2 data collect templates, explores how to customize reports, and uses the power of Corptax Office to analyze your BEPS data.

Objectives:
- Use data collect templates to populate Table 1 and Table 2
- Examine Table 1 and Table 2 reports
- Build customized reports by using report settings and configurations
- Use Corptax Office to assist with analyzing your BEPS data

Jumpstart your GMT Planning with Corptax Global Minimum Tax

O **CES** **CCP**

Hit the ground running with the Global Minimum Tax (GMT) requirements. Learn how you can navigate these changes using our risk analysis and modeling solution. Leverage data you already have in Corptax such as trial balances, provision, and/or Country-by-Country reporting information to estimate your jurisdictional top-up tax risk as a result of the Model GloBE Rules.

Objectives:
- Determine what setup is impacted by the GMT process
- Discover how to enter GloBE and other needed adjustments
- Examine available GMT reports
- Explore Corptax tools that can help you analyze the potential impacts of the GMT rules

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-70200
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- May 9

Course Time:
10:00 AM–12:00 PM CT

Corptax Data Management Track

Corptax Data Management Track

Data Management Using Corptax Query Tools

O **CES** **CCP**

Curious about Corptax Web and its Data Management capabilities? Explore the Data Management area in Corptax Web, focusing on query tools. Learn about queries, how to copy and modify data, and about new rules-based and advanced query functionality.

Objectives:
- Distinguish between the different types of queries and learn how to use them
- Use queries to review and report on data and enter, copy, and modify data
- Discover how to set up Corptax BOTS to automate processing

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-50000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 18
- May 2* (10:00 AM–12:00 PM CT)

Course Time:
1:00 PM–3:00 PM CT

Introduction to Corptax Office

O **S** **CES** **CCP**

See the power of Corptax Office at your fingertips. Optimize your existing Excel workpapers for a secure and seamless gateway to send and receive critical Corptax data in a matter of seconds!

Objectives:
- Identify the basic navigational tools and use the Corptax Office interface
- Examine and apply Corptax security to Excel
- Use an existing Excel spreadsheet
- Send and receive book and adjustment amounts to and from Corptax
- Explore the interface audit trail

Online Course

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-52000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 12
- March 8
- May 13* (2:00 PM–4:00 PM CT)
- July 16

Course Time:
10:00 AM–12:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-52000R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 75 minutes
CCP Eligible: No

O Online Training Course	**S** Self-Study Course (No CPE)	**CES** Continuous Education Subscription Eligible
C Classroom Training Course	**S+** Self-Study Course (CPE)	**CCP** Corptax Certified Professional (CCP) Eligible

Corptax Data Management Track

Next Level Automation with Corptax Office

O **S** **CES** **CCP**

Tackle your most challenging data collection and management reporting requirements. Examine Corptax Office features like pulling data from Corptax tables, and the power of Point of View to increase automation capabilities.

Objectives:
- Use core Corptax Office formulas and documentation for complex scenarios
- Develop Data Maps and a Data Template
- Discover advanced techniques for data manipulation, extraction, and options

Online Course

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-52100
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 22
- February 13
- April 18
- June 10
- July 29

Course Time:
2:00 PM–4:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-52100R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 1.5 hours
CCP Eligible: No

Using Corptax Office with Your Provision Data

O **S** **CES** **CCP**

Learn how to optimize your tax provision process with Corptax Office. Retrieve Corptax data for analysis with a real-time refreshable connection. Post data back to Corptax after review.

Objectives:
- Use core Corptax Office formulas and documentation for complex scenarios
- Develop Data Maps and a Data Template at the next level
- Discover advanced techniques for data manipulation, extraction, and options

Online Course

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-52101
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- May 29

Course Time:
10:00 AM–12:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-52101R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: TBD
CCP Eligible: No

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax Data Management Track

Using Corptax Office with Your International Data

O **CES** **CCP**

Discover how Corptax Office, the Excel add-in, works with Corptax from the particularly unique International compliance point of view. Corptax Office can optimize and drive efficiency in your reporting workload by leveraging your processes.

Objectives:
- Use core Corptax Office formulas and documentation for complex scenarios
- Develop Data Maps and a Data Template at the next level
- Discover advanced techniques for data manipulation, extraction, and options

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-52102
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 26
- June 21

Course Time:
10:00 AM–12:00 PM CT

How to Master Corptax Amount Import

O **S** **CES** **CCP**

Are you responsible for importing trial balance data into Corptax? Examine the tools that help you efficiently import your data throughout the year for compliance, provision, and planning.

Objectives:
- Carry out the steps of creating a package and connector and processing a package
- Evaluate the results after completing a data import
- Make use of lookups to convert general ledger data codes to codes used in Corptax profiles

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-53000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 16
- February 9
- July 11* (2:00 PM–4:00 PM CT)

Course Time:
10:00 AM–12:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-53000R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 66 minutes
CCP Eligible: No

O Online Training Course	**S** Self-Study Course (No CPE)	**CES** Continuous Education Subscription Eligible	
C Classroom Training Course	**S+** Self-Study Course (CPE)	**CCP** Corptax Certified Professional (CCP) Eligible	

Corptax Data Management Track

Next Level Corptax Data Import

O **CES** **CCP**

Get savvy using data exchange tools to import trial balance data and beyond into Corptax for increased business process automation. You'll also learn how to export data for improved reporting and analysis.

Objectives:
- Use derived columns to control what data you import
- Examine a reject after importing Schedule M data
- Structure data filters for importing state modification data
- Discover how to manage connectors
- Import entity properties and data in a *.dat* file

Delivery Method: Online	**Advanced Prep:** None
Subject Area: Taxes	**CPE:** 2
Course Level: Intermediate	**Duration:** 2 hours
Course Number: 06-53010	**CCP Eligible:** Yes
Prerequisite: None	

Course Dates:
- January 24
- March 19
- June 18* (2:00 PM–4:00 PM CT)

Course Time:
10:00 AM–12:00 PM CT

Discover Corptax Data Collect Possibilities

O **CES** **CCP**

Are you looking for a way to improve your internal controls around the data collection process? This session will cover the different methods Corptax provides for collecting your data. See the options Corptax provides for collecting your Domestic, International, Provision, and BEPS data. Discover how Corptax security and processes can ensure only authorized users have access to data.

Objectives:
- Distinguish between data collect workpapers and data source-driven collection methods
- Explore the types of data gathered using Corptax data collection methods
- Discuss how Corptax security features control access to data
- Review status reporting options for monitoring your data collection efforts

Delivery Method: Online	**Advanced Prep:** None
Subject Area: Taxes	**CPE:** 2
Course Level: Basic	**Duration:** 2 hours
Course Number: 06-54000	**CCP Eligible:** Yes
Prerequisite: None	

Course Dates: Sessions are available on request.

Corptax Data Management Track

Corptax Web Reporting

O CES CCP

Improve your reporting capabilities in Corptax Web with enhanced reporting settings, aggregation and comparison features that you configure on the fly.

Objectives:
- Understand the changes to calculations and reporting
- Change Report settings
- Configure reports to add new column filters and aggregate rows of data
- Print reports using Cart Manager
- Configure Data Collect templates
- Generate comparative reporting

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-55000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates: Check back for future dates

Automating Your Processes Using Corptax BOTS

O **S** CES CCP

Struggling to keep up with increasing workloads? Use Corptax BOTS to accelerate low-value tasks and gain time for planning and analytics.

Objectives:
- Discover how Corptax BOTS works
- Determine where to use bots
- Identify the steps to set up a bot

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-56000
Prerequisite: None

Advanced Prep: None
CPE: 1.5
Duration: 1.5 hours
CCP Eligible: Yes

Course Dates:
- January 30
- April 22
- July 18

Course Time:
10:00 AM–11:30 AM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-56000R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 63 minutes
CCP Eligible: No

Corptax Data Management Track

Corptax Database Connections

O **CES** **CCP**

Discover how the Corptax ODBC Driver will help you connect to Corptax data using Microsoft applications or other 3rd party tools.

Objectives:
- Define ODBC terminology
- Examine the benefits of Corptax ODBC Driver
- Build and modify data connections to Corptax
- Discover how Corptax ODBC Driver works with other various applications

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-58000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- April 29

Course Time:
2:00 PM–4:00 PM CT

Using Corptax to Setup Workflow

O **CES** **CCP**

Organize a variety of tasks into a process flow to streamline your compliance, provision, or data collection process, saving time and reducing risk. Assign tasks and set up status reports to display your current progress.

Objectives:
- Identify the standard workflows available to control the process flow of data
- Design user-defined workflows to organize your tasks into well-defined process flows
- Outline available activities in your process flow such as: importing data, launching a workpaper, reviewing spreadsheets, and accessing a web page
- Recognize how to assign users to complete the set of tasks for an entity or group of entities

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-59101
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- February 20

Course Time:
1:00 PM–3:00 PM CT

Corptax Data Management Track

Explore Microsoft Excel Features

O **CES**

Expand your Microsoft Excel skills and opportunities to work with Corptax data! Learn how to improve analysis while reducing manual work and data errors with key Excel features including combining data from multiple sources into a pivot table, adding slicers and formulas, using shortcut key commands, and more!

Objectives:
- Navigate Excel more efficiently using shortcut key commands
- Enhance how you view and analyze data using various Excel functions and features
- Enrich your analysis with Excel pivot tables, slicers, and formulas

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-80001
Prerequisite: None

Advanced Prep: None
CPE: 1.5
Duration: 1.5 hours
CCP Eligible: No

Course Dates:
- May 28

Course Time:
2:00 PM–3:30 PM CT

Using Microsoft Excel PivotTables and Power Pivot Add-in for Corptax Analytics

O **CES**

Utilize Excel PivotTables and the Power Pivot Add-in to analyze your Corptax data and gain a different perspective on your reporting. Summarize key data quickly from one or multiple data sources and slice and dice data in meaningful ways.

Objectives:
- Identify how Excel PivotTables and Power Pivot are used to analyze your Corptax data
- Create and format a PivotTable and a Power Pivot Table
- Add measures (calculations) to a PivotTable
- Discover the advantages of using the Data Model
- Recognize how Power Pivot enhances data collection, storage, and data manipulation

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-80100
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates:
- April 30* (10:00 AM–12:00 PM CT)

Course Time:
2:00 PM–4:00 PM CT

Corptax Data Management Track

Using Power BI Desktop with Corptax Data

O **CES**

Discover how Microsoft Power BI Desktop improves your data visualization, analysis, monitoring, and transparency. Import and transform data from multiple Corptax sources, then create dynamic dashboards with informative charts, measures, and matrixes. Feel empowered to make quick, data-driven decisions and share insights with others.

Objectives:
- Understand Power BI uses and how to build
- Recognize the need for and learn to construct a Power BI dashboard using Corptax data
- Import and transform data into Power BI using Power Queries
- Visualize data using charts, maps, and matrixes
- Identify publishing options
- Understand maintenance requirements for using new sets of data

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-80101
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates:
- February 29

Course Time:
10:00 AM–12:00 PM CT

Leverage Corptax Data with Microsoft Excel Features

O **CES**

Learn to effectively pull and clean your data in Excel, create interactive dashboards, and analyze your workbooks for potential problems or inconsistencies. Discover advanced Excel features and add-ins to assist you with tasks using Power Query, Power Pivot, Power View, 3D Map, and Inquire.

Objectives:
- Identify advanced Excel features to analyze Corptax data
- Use Inquire to analyze, compare, and audit data in multiple workbooks
- Use Power Query to retrieve data from Corptax
- Create visualizations with Power Pivot, Power View, and 3D Map
- Build a relationship between data and Power Pivot
- Create a dashboard to view Corptax data

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Overview
Course Number: 06-81000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates:
- July 19

Course Time:
10:00 AM–12:00 PM CT

Managing Documents with Corptax DocManager

`S` `CES`

Struggling with tracking and sharing your supporting tax documents? Learn how you can use Corptax DocManager to centrally store, share, and edit documents more easily. Discover how to publish returns, reports, and more from within Corptax, as well as how you can label, store, and organize your tax documents in DocManager.

Objectives:
- Learn how to publish returns, reports, and workpapers into Corptax DocManager
- Tag relevant information to your documents as you publish them
- Upload and attach supporting documents from DocManager to Workpapers in Corptax Web
- Create and customize document libraries and views to help you navigate large groups of tax documents

Delivery Method: Self-Study
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-59200R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: TBD
CCP Eligible: No

`O` Online Training Course
`C` Classroom Training Course
`S` Self-Study Course (No CPE)
`S+` Self-Study Course (CPE)
`CES` Continuous Education Subscription Eligible
`CCP` Corptax Certified Professional (CCP) Eligible

Corptax Entity Management Track

Corptax Entity Management Track

Managing Entity Data Using Corptax Entity Properties and Views

O **CES** **CCP**

Imagine having one location to track all entity information changes. Learn how to create new entity properties to help you with unique entity groupings, rollups, and views.

Objectives:
- Identify entity properties supplied by Corptax vs. user-defined entity properties
- Discover how to create properties and track changes to entity properties across time
- Build security for entity views to reduce errors within your entity data
- Analyze entity structures and create reports

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-76000
Duration: 2 hours

Prerequisite: None
Advanced Prep: None
CPE: 2
CCP Eligible: Yes

Course Dates:
- January 19
- July 22

Course Time:
10:00 AM–12:00 PM CT

Managing Entity Structures Using Corptax Ownership and Query Groups

O **S** **CES** **CCP**

Examine tracking ownership and other related entity data across time automatically. Create query-based groups based on your reporting needs.

Objectives:
- Demonstrate how entity management integrates with Corptax to drive efficiency
- Utilize your organization's reporting structures by using entity groups
- Compare the difference between entity groups and custom groups
- Improve the ability to maintain ownership data in Corptax and reduce risk of input errors in your organization's structure

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-76010
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 23

Course Time:
2:00 PM–4:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-76010R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 73 minutes
CCP Eligible: No

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax e-File Track

Corptax e-File Track

Corptax U.S. Compliance: Filing Federal Amended Returns

O **S** **CES** **CCP**

Discover the steps to prepare and e-File your amended federal return and recognize how you can use Corptax to analyze various settlement position scenarios.

Objectives:
- Evaluate as-filed returns for accuracy and post amounts
- Create a revised return and post amounts
- Prepare amended return forms for filing
- Summarize e-file considerations
- Compare different settlement scenarios

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-20200
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates: Sessions are available on request.

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-20200R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 1 hour
CCP Eligible: No

Corptax U.S. Compliance: Filing State Amended Returns

O **S** **CES** **CCP**

Use the data already in Corptax to streamline and automate the process of filing amended state returns.

Objectives:
- Evaluate as-filed returns for accuracy and post amounts
- Create a revised return and post amounts
- Prepare amended return forms for filing
- Summarize e-file considerations

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-23200
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates: Sessions are available on request.

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-23200R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 1 hour
CCP Eligible: No

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax e-File Track

Hands-on Federal e-Filing Using Corptax (NEW)

C **CES** **CCP**

Gain a thorough understanding of the key steps for e-filing your federal returns using Corptax. Discover how best practices around organizing your returns, completing e-file requirements, and reviewing your packages can reduce errors and streamline your process.

Objectives:
- Identify the steps of the Corptax e-File process
- Understand the differences for processing Legacy and Automated (Next Gen) forms
- Recognize and use Corptax-provided tools to simplify your e-file process

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: 03-26001
Prerequisite: None

Advanced Prep: None
CPE: 2.0
Duration: 2.0 hours
CCP Eligible: Yes

Course Dates: Check back for future dates

Corptax e-File Processing

S **CES**

Discover e-File best practices for your Corptax Federal returns. Prevent mistakes before they happen, organize your returns, add attachments, and review the e-File package for a successful filing.

Objectives:
- Outline the phases of the Corptax e-File process
- Discover Corptax resources to guide you through the e-file process
- Complete key federal forms required for e-filing
- Recognize and use Corptax tools to simplify your e-file process

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-26000R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 69 minutes
CCP Eligible: No

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax e-File Track

Federal e-Filing Using Corptax (NEW)

O **CES** **CCP**

Gain a thorough understanding of the key steps for e-filing your federal returns using Corptax. Discover how best practices around organizing your returns, completing e-file requirements, and reviewing your packages can reduce errors and streamline your process.

Objectives:
- Identify the steps of the Corptax e-File process
- Understand the differences for processing Legacy and Automated (Next Gen) forms
- Recognize and use Corptax-provided tools to simplify your e-file process

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-26001
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2.0 hours
CCP Eligible: Yes

Course Dates:
- April 9
- June 3* (2:00 PM–4:00 PM CT)

Course Time:
10:00 AM–12:00 PM CT

State e-Filing Using Corptax

O **S** **CES** **CCP**

Examine the Corptax resources and tools provided to help you manage the electronic filing process for your state returns. Create filing groups, add attachments, correct errors and certify the package that will be sent to the state tax jurisdiction.

Objectives:
- Differentiate between the Fed/State and State Alone return filing methods
- Discover Corptax resources to guide you through the e-file process
- Complete key state forms required for e-filing
- Use Corptax e-File to create and review both a separate and consolidated state return

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-26100
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- February 7
- May 6
- July 25

Course Time:
1:30 PM–3:30 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-26100R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 69 minutes
CCP Eligible: No

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax e-File Track

Resolving e-File Errors in Corptax

`O` `S` `CES` `CCP`

Get proficient resolving e-File errors by taking advantage of the various Corptax tools available at your fingertips. Discover ways to organize your folders and filing groups and learn to troubleshoot your federal and state returns.

Objectives:
- Use Corptax resources to guide you through the e-File process
- Organize filing groups to simplify the correction of errors
- Discover best practice methods for troubleshooting errors
- Dissect error messages to quickly identify the source of the error

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-26200
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- April 11
- June 6

Course Time:
2:00 PM– 4:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-26200R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 78 minutes
CCP Eligible: No

Mixed Returns Using Corptax

`O` `CES` `CCP`

Does your organization consist of a combination of non-insurance entities with at least one Property & Casualty or Life Insurance entity? If so, attend this course on how to prepare your mixed return for electronic filing. Gain insight on the additional steps necessary to ensure taxable income properly flows to your return.

Objectives:
- Prepare a mixed return in Corptax
- Create the entity structures for the subsidiaries
- Bring the data into Corptax e-File

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-26300
Prerequisite: None

Advanced Prep: None
CPE: 3
Duration: 2.5 hours
CCP Eligible: Yes

Course Dates: Check back for future dates

Corptax e-File Track

Electronically Filing Form 7004 in Corptax

O **CES** **CCP**

Tips and tricks to ensure your federal extension e-Filing process goes smoothly—from picking the correct calculation, to reviewing the e-File package, to transmitting the return to the IRS.

Objectives:
- Discover Corptax resources to guide you through the e-file process for your Form 7004
- Prepare the necessary forms and statements related to the Form 7004
- Use Corptax e-File to prepare and review Form 7004

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-26400
Prerequisite: None

Advanced Prep: None
CPE: 1.5
Duration: 1.5 hours
CCP Eligible: Yes

Course Dates:
- February 26
- April 3

Course Time:
2:00 PM–3:30 PM CT

Corptax Partnership e-Filing

O **CES** **CCP**

Identify the major steps in the Corptax e-File process for the federal and state partnership returns.

Objectives:
- Identify areas of the federal and state partnership returns that need to be completed for e-file purposes
- Complete major steps of the e-file process such as:
    - Creating the entity structure MeF report and filing group
    - Loading files into the filing group
    - Attaching documents
    - Clearing basic partnership errors
    - Creating the e-file package and viewing its contents
    - Downloading and transmitting the e-file package

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-36000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates: Sessions are available on request.

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax e-File for Foreign Bank Account Report (FBAR)

`O` `S` `CES` `CCP`

Use time-saving templates and data import to complete your FBAR filings. Transmit the return and interpret the acknowledgement status from FinCEN to ensure you have met your filing obligations.

Objectives:
- Identify the requirements to complete and e-File FBAR
- Discuss penalties for incorrectly filing FBAR
- Use both the data import and manual entry methods of adding account and owner information into Corptax
- Prepare and review FBAR to verify it is ready for transmittal
- Discuss the transmission process

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-70000
Prerequisite: None
Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates: Check back for future dates

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-70000R
Prerequisite: None
Advanced Prep: None
CPE: None
Duration: 36 minutes
CCP Eligible: No

Corptax U.S. Compliance Federal Considerations

`S` `CES`

Part 1
Learn how to prepare the appropriate forms and schedules within your federal tax return, review diagnostics and post back calculated values to be used for analysis.

Objectives:
- Examine the Corptax tools inherent in the federal return process
- Review additional items related to taxable income:
  - Charitable Contributions
  - Depreciation and Amortization (Form 4562)
  - Gains and Losses (Sch M-3, Form 4797 & Sch D)

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-20150R-1
Prerequisite: None
Advanced Prep: None
CPE: None
Duration: 87 minutes
CCP Eligible: No

Part 2
Learn how to prepare the appropriate forms and schedules within your federal tax return, review diagnostics and post back calculated values to be used for analysis.

Objectives:

- Review additional items for forms and schedules:
  - Underpayment of Estimated Taxes (Form 2220)
  - Affiliation Schedule (Form 851)
  - General Business Credit (Form 3800)
- Explor the Corptax tools to analyze data and enhance reports

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-20150R-2
Prerequisite: None
Advanced Prep: None
CPE: None
Duration: 87 minutes
CCP Eligible: No

Corptax Indirect Tax Track

Corptax Indirect Tax Track

Corpsales—Basic

C **CES**

Are you a new Corpsales user? If so, attend this session to hit the ground running. Be able to perform the return preparation process from start to finish. Learn how to set up profiles, import amounts, and generate returns. Also, learn necessary information about monthly and annual maintenance requirements.

Objectives:
- Set up profiles
- Recognize how to import and query amounts
- Learn how to set up return folders and return files
- Select calculation options
- Learn to print returns and batches
- Customize calculations
- Back up and restore amounts

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-60000
Prerequisite: None

Advanced Prep: None
CPE: 19.5
Duration: 2.5 days
CCP Eligible: No

Course Dates for Dallas, TX:
- March 25-27

Course Time:
- Day 1:
  8:30 AM–4:30 PM CT
- Day 2:
  8:30 AM–4:30 PM CT
- Day 3:
  8:30 AM–12:00 PM CT

Corpsales—Advanced

C **CES**

Are you an advanced Corpsales user ready to go beyond basic compliance? Learn how to improve your department's efficiency and productivity by attending this Corpsales advanced session. Discover how to customize calculations, create upload files, and generate management and compliance reports.

Objectives:
- Audit and trace amounts
- Choose to customize the GLOBAL and base calculations
- Create an upload file
- Design and generate reports (or a form such as a check request or payment voucher) using Report Editor

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Advanced
Course Number: 03-60010
Prerequisite: None

Advanced Prep: None
CPE: 19.5
Duration: 2.5 days
CCP Eligible: No

Course Dates: Check back for future dates

Corpsales Process Training

O **CES**

Explore best practices to quickly enter data and prepare the necessary files and folders for processing monthly sales & use returns. Identify key steps to ensure that jurisdictional requirements are updated for the current reporting period.

Objectives:
- Review the steps for using Corpsales for monthly sales & use tax compliance
- Distinguish between the processes for loading monthly updates and performing software updates to ensure Corpsales includes the latest collateral needed for filing sales & use returns in each jurisdiction
- Import source data files and manually enter adjustments needed for sales & use returns
- Prepare the data files and folders necessary for processing returns of the current reporting period

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-60000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates:
- February 2

Course Time:
1:00 PM–3:00 PM CT

Understanding Corpsales Process and Profiles

O **CES**

Improve your efficiency by understanding how the process flow in Corpsales helps you capitalize on the system features. Examine the different types of data profiles and how they populate sales tax forms. Learn how easy it is to add information for new reporting outlets and other data crucial to the return preparation process.

Objectives:
- Optimize your sales and use return preparation process
- Explain how Corpsales profiles are used to populate sales tax forms
- Utilize "roll-up" codes to consolidate profile information to support jurisdictional reporting requirements
- Understand the various methods to enter profile data
- Modify the corporation profile to add an additional reporting unit or outlet

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-60001
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates: Check back for future dates

O Online Training Course	**S** Self-Study Course (No CPE)	**CES** Continuous Education Subscription Eligible	
C Classroom Training Course	**S+** Self-Study Course (CPE)	**CCP** Corptax Certified Professional (CCP) Eligible	

Corptax Indirect Tax Track

Using Corpsales Amount Import and Query Tools

O **CES**

Discover how Corpsales amount import tools can optimize your monthly data gathering process. Automate more of your data import with ease to reduce time spent on manual data entry and overrides. Pump up your productivity even further with query functions beyond basic data entry.

Objectives:
- Use template and conversion files to ensure proper loading of transactional data into Corpsales
- Modify existing conversion files to adjust for changes in transactional data files
- Define parameters to create and run queries that will help you identify and make needed adjustments

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-60002
Prerequisite: 06-60001*

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates: Check back for future dates

*06-60001: [Understanding Corpsales Process and Profiles](#)

Preparing and Reviewing Corpsales Returns

O **CES**

Take advantage of the advanced Corpsales features of e-filing and requesting electronic payments to craft a more effective return preparation process. Learn key steps, tips, and best practices for properly setting up your filing requirements and creating and troubleshooting returns.

Objectives:
- Identify the Corpsales windows that contain key elements of returns and calculations
- Set up and review return information in Corpsales
- Learn about auditing and tracing a return item to identify incorrect or unexpected values
- Prepare a return for e-filing
- Use Corpsales standard tools to generate electronic payment requests

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-60003
Prerequisite: 06-60001*

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: No

Course Dates: Check back for future dates

*06-60001: [Understanding Corpsales Process and Profiles](#)

O Online Training Course	**S** Self-Study Course (No CPE)	**CES** Continuous Education Subscription Eligible
C Classroom Training Course	**S+** Self-Study Course (CPE)	**CCP** Corptax Certified Professional (CCP) Eligible

Corptax Insurance Track

Corptax Basic Insurance Series

O **CES** **CCP**

Are you filing a Life Insurance or Property and Casualty Insurance return in Corptax? See the full preparation process from importing data to reviewing and filing the returns.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic

Course Number: 06-33000
Prerequisite: None
Advanced Prep: None

Duration: 2.5 days

CCP Eligible: Yes
Course Dates:
Check back for future dates

Individual Modules—Day 1

Course Number:
06-33000-1
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

Overview: New to Corptax and the insurance return preparation process? Walk through preparing both Life and PC returns in the Corptax Basic Insurance Series.

Objectives:
- Discuss how the characteristics of a common user experience, common database, and common administration drive efficiency in Corptax
- Recognize each of the steps of the federal return data process flow
- Use basic Corptax tools such as ribbons and grids to navigate through the application
- Use different methods to obtain assistance or information about the Corptax application
- Identify the key profiles used in the federal return process
- Describe how profiles are used to organize data and drive return/report results

Course Number:
06-33000-2
Course Time:
1:00 PM–3:30 PM CT
CPE: 3

Import: This session is a hands-on approach to importing amounts for both trial balance and the National Association of Insurance Commissioners (NAIC) data.

Objectives:
- Perform the major steps that make up the data import process, including creating a package, creating a connector, and processing a package
- Utilize lookups, including creating lookups (Conversion tables) to convert general ledger data codes to codes used in Corptax Profiles, formatting the general ledger data for conversion and import into Corptax, and setting reversals
- Check an import once you have completed the data import process

Individual Modules—Day 2

Course Number:
06-33000-3
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

Enter/Review Trial Balance: During this session, you will explore how you can review trial balance data in Corptax. You will learn key concepts that control how Corptax stores this data within the system and get hands-on experience with how you can efficiently review your data for accuracy.

Objectives:
- Use the Enter Amounts window for data entry and data review
- Review federal balance sheet data and P&L data
- Review the audit trail for an amount
- Post adjusting entries
- Review trial balance reports

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Corptax Insurance Track

Course Number:
06-33000-4
Course Time:
2:00 PM–4:00 PM CT
CPE: 2

1120PC: This session concentrates on the steps necessary to prepare the Federal 1120 Property and Casualty return and its supporting schedules for your company. You will learn about the various workpapers available for posting adjustments and reviewing data.

Objectives:
- Review the diagnostic document
- Set Calculation options
- Audit and trace amounts
- Learn about the Schedule M-3 and supplemental statements
- Enter off trail balance form data
- Post amounts to the amount database
- Create, launch, and review a consolidated federal return, including reviewing diagnostics, setting calculation options, and reviewing a consolidated return by entity

Individual Modules—Day 3

Course Number:
06-33000-5
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

1120L: Discover the final steps to prepare a Federal 1120 Life return along with supporting schedules. There are workpapers used for reviewing and posting adjustments.

Objectives:
- Review the diagnostic document
- Set calculation options
- Audit and trace amounts
- Learn about the Schedule M-3 and supplemental statements
- Enter off trial balance form data
- Post amounts to the amount database
- Create, launch, and review a consolidated federal return, including reviewing diagnostics, setting calculation options, and reviewing a consolidated return by entity

Corptax International Compliance Track

International Compliance Processing Using Corptax

C **CES** **CCP**

This course highlights how you can benefit from the enhanced and integrated functionality of Corptax and Corptax International to process the U. S. tax filing requirements of your foreign company operations. You will gain a thorough understanding of Corptax's proven process for preparing, entering, and adjusting the data necessary for generating Form 5471 and Form 1118.

You will learn to navigate the Corptax desktop and web interfaces that support data entry and analysis. You will discover how data is stored within the Corptax database. You will take an in depth look at how key items; such as ownership, foreign exchange rates, look-through coding, previously taxed earning and profits, affect the international calculation. You will perform sourcing on both foreign and domestic entitles to categorize the current year earnings and profits and taxable income necessary for correctly calculating GILTI, FDII, and the Foreign Tax Credit. You will identify key Corptax reports that can be used for reconciling and analyzing your data. The concepts and processes will all be covered in detail with hands-on instructor lead examples performed within a live training environment.

Objectives:
- Describe the Corptax Resources that can assist you during the international return filing process
- Discover how to navigate in both Corptax Web and Corptax to easily access key information needed for the international return filing process
- Explain how Corptax profiles are used to populate international forms
- Use various methods to enter data and adjust amounts
- Describe how the international calculation drives data to the international forms
- Use the PEARL process to produce international forms
- Use Corptax provided tools and resources to analyze and review data related to international forms

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-40000
CCP Eligible: Yes

Prerequisite: None
Advanced Prep: None
CPE: 23
Duration: 3 days

Course Time:
- Day 1: 8:30 AM–4:30 PM
- Day 2: 8:30 AM–4:30 PM
- Day 3: 8:30 AM–4:30 PM

Course Dates for Dallas, TX:
- February 6-8

Understanding Corptax Fundamentals for International Compliance Workshop Series

O **S+** **CES** **CCP**

Online Course

Learn how to process the U.S. tax filing requirements of your foreign company operations. Gain an understanding of preparing and entering the data necessary for generating Form 5471 and Form 1118. Discover the International process flow (i.e., the PEARL process) and examine the different types of data (profiles) used to populate International forms. Navigate the Corptax desktop and web interfaces that support data entry and analysis. Discover how data is stored within the Corptax database and explore resources and tools that can assist you during your International return prep.

Delivery Method: Online	**Course Number:** 06-40000	**Duration:** 3 days	**Course Dates:**
Subject Area: Taxes	**Prerequisite:** None	**CCP Eligible:** Yes	• January 9-11
Course Level: Basic	**Advanced Prep:** None		• March 5-7
			• July 23-25

Individual Module—Day 1

Course Number:
06-40000-1
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

International Return Preparation Overview: Navigate the Corptax desktop and web interfaces and identify various resources and tools that you can use throughout your international process.

Objectives:
- Discover how to use the navigation features in Corptax and Corptax Web
- Review how to use Corptax resources and tools
- Explain the overall return preparation process for the Form 5471 and Form 1118

Individual Module—Day 2

Course Number:
06-40000-2
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Understanding Corptax Profiles: Discover the International process flow (i.e., the PEARL process) and examine the different types of data (profiles) used to populate International forms.

Objectives:
- Discover how to navigate in both Corptax Web and Corptax to easily access key information needed for the international return filing process
- Explain how Corptax profiles are used to populate international forms

Individual Modules—Day 3

Course Number:
06-40000-3
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Entering Data and Posting Adjustments: Discover how data is stored within the Corptax database. Explore how to manually enter data, import data, and use the automated adjustment functionality. Review different ways to view book to tax data and how to perform an international mapping.

Objectives:
- Manually enter amounts
- Use the data import process
- Check the trial balance
- Post adjustments
- Performs international amounts mappings

O Online Training Course	**S** Self-Study Course (No CPE)	**CES** Continuous Education Subscription Eligible
C Classroom Training Course	**S+** Self-Study Course (CPE)	**CCP** Corptax Certified Professional (CCP) Eligible

Corptax International Compliance Track

Self-Study Course

Module 1—International Return Preparation Overview

Navigate the Corptax desktop and web interfaces and identify various resources and tools that you can use throughout your international process.

Objectives:
- Examine the features to navigate Corptax and Corptax Web
- Locate Corptax resources and tools
- Discover how to perform the International return preparation process
- Explain the overall return preparation process for the Form 5471 and Form 1118

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-40000S-1
Prerequisite: None
Advanced Prep: None

CPE: 1
Duration: Self-Paced

Module 2—Understanding Corptax Profiles

Discover the International process flow (i.e., the PEARL process) and examine the different types of data (profiles) used to populate International forms.

Objectives:
- Discover how to navigate in both Corptax Web and Corptax to easily access key information needed for the international return filing process
- Explain how Corptax Profiles are used to populate international Forms

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-40000S-2
Prerequisite: None
Advanced Prep: None

CPE: 2
Duration: Self-Paced

Module 3—Entering Data and Posting Adjustments

Discover how data is stored within the Corptax database. Explore how to manually enter data, import data and use the automated adjustment functionality. Review different ways to view book to tax data and how to perform international mapping.

Objectives:
- Identify where you can manually enter amounts
- Determine which options to select when running the data import process
- Repeat the steps to view the trial balance
- Recognize the steps to post adjustments
- Discover how to perform international amount mapping

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-40000S-3
Prerequisite: None
Advanced Prep: None

CPE: 1.5
Duration: Self-Paced

O Online Training Course **S** Self-Study Course (No CPE) **CES** Continuous Education Subscription Eligible
C Classroom Training Course **S+** Self-Study Course (CPE) **CCP** Corptax Certified Professional (CCP) Eligible

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International Compliance Using Corptax Next Gen or Legacy Methods to File Form 5471 Workshop Series

O **CES** **CCP**

This series is a must for anyone preparing 5471s. Learn how to prepare and reconcile the Form 5471 using the Legacy and Next Gen methods. Navigate the Corptax desktop and web interfaces that support data entry and analysis. Walk through the steps of determining which sourcing method to use for categorizing foreign data, entering data related to foreign entities, and processing the international calculation. Discover the many resources and tools that Corptax provides for analyzing Form 5471 data.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic

Course Number: 06-41000
Prerequisite: None
Advanced Prep: None

Duration: 4 days
CCP Eligible: Yes

Course Dates:
- February 20-23
- April 2-5
- April 30-May 3*
- June 11-14

Alternate times: Modules 1-3 are held from 1:00 PM–3:30 PM CT and Module 4 is held from 1:00 PM–2:30 PM CT.

Individual Modules—Day 1

Course Number:
06-41000-1
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Preparing Foreign Data for the International Calculation: Walk through the steps of determining which sourcing method to use for categorizing foreign data, and entering data related to foreign entities.

Objectives:
- Discuss key filing requirements for the Form 5471 and its schedules
- Discover how source data necessary for the Form 5471 is stored in Corptax and used in calculations to drive data to the form
- Source amounts related to foreign domicile entities, and look-through transactions between foreign and domestic entities
- Review and enter other key information (i.e. tax payments, tax liability by country, filing status, etc.) that is required for preparing the Form 5471

Individual Modules—Day 2

Course Number:
06-41000-2
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Processing the International Calculation and Setting Up Form 5471: Discuss the International Master Settings and perform the steps necessary process in the International Calculation. Discover all of the common areas of return/report navigation.

Objectives:
- Process the International Calculation
- Use the Tax Return window to review and print returns
- Use various methods to organize returns and reports

Individual Modules—Day 3

Course Number:
06-41000-3
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Using the Next Gen Form 5471: Participate in an overview of the automated form and key considerations when completing the various schedules associated to Form 5471.

Objectives:
- Prepare the Form 5471 schedules using a Next Gen form

Individual Modules—Day 4

Course Number:
06-41000-4
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

Using the Legacy Form 5471 and Analyzing Your Returns: Participate in an overview of the legacy form and key considerations when completing the various schedules associated to Form 5471. Explore the many resources and tools that Corptax provides for analyzing Form 5471 data.

Objectives:
- Prepare the 5471 schedules using a legacy form
- Gain an understanding of the Corptax-provided tools and resources that can be used to analyze and review your data

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Corptax International Compliance: Form 5471 Basic Series

`S` `CES`

Module 1: International Return Preparation Overview

Learn how to navigate in Corptax and how the overall international return preparation works in Corptax.

Objectives:
- Use features to navigate in Corptax and Corptax Web
- Discover how to use Corptax resources and tools
- Review the Foreign Compliance process in Corptax

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 6-501R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 24 minutes
CCP Eligible: No

Module 2: International Setup Process

Find out the setup you need for Corptax International as well as how that information flows into the International calculation process.

Objectives:
- Complete the setup items required for Corptax International
- Discover how to manually enter or import amount data

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 6-502R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 59 minutes
CCP Eligible: No

Module 3: Foreign Processing for CFC's, Foreign Branches, and Foreign Partnerships

This session demonstrates the steps for international processing. Learn how to prepare and review foreign entity reports and post the foreign data required for Form 5471 and 8858 preparation.

Objectives:
- Recognize how to check and prepare trail balance and adjustment data for international purposes
- Perform steps to map and source foreign amounts to the appropriate categories for calculating earnings and profits
- Examine and demonstrate the steps to process foreign calculation and perform foreign postings

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 6-503R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 43 minutes
CCP Eligible: No

Module 4: Form 5471 Report/Return Preparation and Reconciliation

Explore the different 5471 and 8858 calculations provided by Corptax and determine which one you should use for your process. Review how to prepare Form 5471 and discuss strategies for handling special filing requirements.

Objectives:
- Demonstrate how to use the Tax Returns window
- Determine which 5471 calculation to use
- Identify the different methods used to prepare Form 5471 schedules
- Use various methods for printing forms and supporting schedules
- Demonstrate how to prepare and reconcile Form 965

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 6-504R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 74 minutes
CCP Eligible: No

O Online Training Course	**S** Self-Study Course (No CPE)	**CES** Continuous Education Subscription Eligible
C Classroom Training Course	**S+** Self-Study Course (CPE)	**CCP** Corptax Certified Professional (CCP) Eligible

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Preparing Form 8865 Using Corptax International and Partnership Series

O **CES** **CCP**

Using Corptax Pass Through, examine and complete the setup requirements to prepare the Form 8865. View partner allocations, tiering, and inclusion of partner earnings. Distinguish the recommended option by reviewing the Form 8865 preparation results in Corptax International to integrate the partnership activity into the respective legal entity structures.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate

Course Number: 06-41015
Prerequisite: None
Advanced Prep: None

Duration: 4 hours
CCP Eligible: Yes

Course Dates: Sessions are available on request.

Individual Modules

Course Number:
06-41015-1
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

Module 1: This session looks at aspects of preparing Form 8865 such as creating and associating partners and entering special allocations. Learn to recognize the purpose of the various Form 8865 calc files. Discuss how you can work with functional currency trial balances to prepare the form and include in E&P. Partner's capital account analysis and K-1 statements will also be discussed.

Objectives:
- Walk through partnership setup in Corptax Pass Through
- Discuss the various Form 8865 calculations and uses
- Understand how Form 8865 schedules populate
- Prepare a Form 8865

Course Number:
06-41015-2
Course Time:
2:00 PM–4:00 PM CT
CPE: 2

Module 2: Foreign Partnership compliance does not stop at preparing Form 8865. This session examines:

- Hybrid structures such as mixed domicile ownership structure and mixed currency tiering
- When to populate this exchange rates (CFCCON accounts) and the entities for which to populate them
- How to make partner allocations
- How to handle a change in ownership
- What functional currency to use for the partnership and the branches and how the choice of functional currency affects the international E&P
- How to bring in tiering adjustments into Corptax International
- How to include DREs in Form 8865 and how to include partnerships in Form 5471

Objectives:
- Review options for hybrid entity setup
- Learn how exchange rates are populated
- Discuss inclusion of lower tier branch entities
- Review partner tiering and ownership interest

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Corptax International Compliance Track

International Compliance Using Corptax – Maintaining Your Profiles for the Experienced User

O **CES** **CCP**

Join this session to gather best practices and tips & tricks that will streamline the administrative tasks surrounding annual maintenance for your international entities. You learn how to setup key information related to international compliance and how changes to this setup information can be tracked over each tax period. You will see first-hand how to utilize this vital setup information in Visual Org to get a graphic depiction of your organizations ever-changing entity structures. You will see how to ensure consistency in your international calculations using the International Settings Master, and streamline your adjustments processing using automated adjustments.

Objectives:
- Set up company profiles for International Compliance and Visual Org
- Update International Account Mapping
- Automate Earnings and Profits Adjustments using Corptax Automated Adjustment Workpapers

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-40010
Prerequisite: None
Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates: Check back for future dates

Reporting for Disregarded Entities Using Corptax Automated Form 8858

O **CES** **CCP**

Gain insight on when and how to report for your foreign branches and disregarded entities, from handling the initial ownership setup to creating the automated (Next Gen) Form 8858. Get the scoop on key resources and tools that simplify the process.

Objectives:
- Learn key factors about your check-the-box transactions that affect how you set up and track information in Corptax
- Differentiate between the steps necessary in Corptax depending on whether your check-the-box transaction occurs during the year or at the end of the year
- Perform the necessary setup for both a mid-year and year-end transaction
- Identify key considerations for using the automated (Next-Gen) Form 8858
- Perform the steps to create the automated Form 8858

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-41011
Prerequisite: None
Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- March 21

Course Time:
10:00 AM–12:00 PM CT

Using Corptax International Reports for Your Foreign Process

O **CES** **CCP**

Take a deeper dive into your complex international calculations. This session walks you through creating and matching relevant international whitepaper reports to backing up earnings and profits computation of your controlled foreign corporations. In addition, the session provides details to support your GILTI and Subpart F determinations. Learn how to review these reports for accurate calculations and identify needed corrections before finalizing the federal tax forms for federal e-filing.

Objectives:
- Take part in the steps to set up and create reports
- Identify which reports support Form 5471 schedules
- Examine reports that support the GILTI inclusion
- Examine reports to support the QBU and Legal Entity consolidation

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-41101
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- April 16
- July 10

Course Time:
2:00 PM–4:00 PM CT

Corptax International Compliance - Preparing Form 1118 Workshop Series

O **S** **CES** **CCP**

Online Course

Learn how to prepare the Form 1118 using Corptax International. Determine which sourcing method to use for categorizing domestic data, entering data related to domestic entities, and processing international calculations. Explore the many resources and tools that Corptax provides for analyzing Form 1118 data.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic

Course Number: 06-43000
Prerequisite: None
Advanced Prep: None

Duration: 3 days
CCP Eligible: Yes

Course Dates:
- March 26-28
- June 18-20

Individual Modules—Day 1

Course Number:
06-43000-1
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Preparing Domestic Data for the International Calculation: Determine which sourcing method to use for categorizing domestic data, entering data related to tax payments, expense factor and consolidated adjustments.

Objectives:
- Discuss key filing requirements for the Form 1118 and its schedules
- Discover how source data necessary for the Form 1118 is stored in Corptax and used in calculations to drive data to the form
- Source amounts related to domestic domicile entities, and look-through transactions between domestic and foreign entities.
- Review and enter other key information (i.e. tax payments, expense factor and consolidated adjustments, etc.) that is required for preparing Form 1118

Individual Modules—Day 2

Course Number:
06-43000-2
Course Time:
10:00 AM–12:30 PM CT
CPE: 3

Processing the International Calculation and Setting up Form 1118: Discuss the International Master Setting and perform the steps necessary to process the International Calculation. Learn all of the common areas of return/report navigation.

Objectives:
- Process the International Calculation
- Use the Tax Return window to review and print returns
- Use various methods to organize returns and reports

Individual Modules—Day 3

Course Number:
06-43000-3
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

Preparing and Analyzing Form 1118: Participate in an overview of the form and key considerations when completing the various schedules associated to Form 1118. Explore the many resources and tools that Corptax provides for analyzing Form 1118 data.

Objectives:
- Prepare the Form 1118 schedules using the automated (Next Gen) form method
- Gain an understanding of the Corptax-provided tools and resources that can be used to analyze and review your data

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O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Corptax International Compliance Track

Self-Study Course

Module 1—Preparing Domestic Data for the International Calculation

Determine which sourcing method to use for categorizing domestic data, entering data related to tax payments, expense factor and consolidated adjustments.

Objectives:
- Discuss key filing requirements for the Form 1118 and its schedules
- Discover how source data necessary for the Form 1118 is stored in Corptax and used in calculations to drive data to the form
- Source amounts related to domestic domicile entities, and look thru transactions between domestic and foreign entities
- Review and enter other key information (i.e. tax payments, expense factor and consolidated adjustments, etc.) that is required for preparing Form 1118

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: No

Course Number: 06-43000R-1
Prerequisite: None
Advanced Prep: None

CPE: None
Duration: 68 minutes

Module 2—Processing the International Calculation and Setting up Form 1118

Discuss the International Master Setting and perform the steps necessary to process the International Calculation. Learn all of the common areas of return/report navigation.

Objectives:
- Process the International Calculation
- Use the Tax return window to review and print returns
- Use various methods to organize returns and reports

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: No

Course Number: 06-43000R-2
Prerequisite: None
Advanced Prep: None

CPE: None
Duration: 48 minutes

Module 3—Preparing and Analyzing Form 1118

Participate in an overview of the form and key considerations when completing the various schedules associated to the form 1118. Explore the many resources and tools that Corptax provides for analyzing Form 1118 data.

Objectives:
- Prepare the form 1118 Schedules using the Next Gen form method
- Gain an understanding of the Corptax provided tools and resources that can be used to analyze and review your data

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: No

Course Number: 06-43000R-3
Prerequisite: None
Advanced Prep: None

CPE: None
Duration: 35 minutes

O Online Training Course
C Classroom Training Course

S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)

CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax International Compliance – Review of GILTI and FDII Form Data Workshop Series

`O` `S` `CES` `CCP`

Online Course

Are you looking to gain insight on how data stored in Corptax is used to calculate the GILTI inclusion and the FDII and GILTI deductions reported on Form 8992 and 8993? Join us as we walk through setup for each form and best practices for multiple reporting options. Identify reports, diagnostics, and other Corptax-provided tools to support analysis and reconciliation of the GILTI and FDII calculations reported on the forms.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate

Course Number: 06-43010
Prerequisite: None
Advanced Prep: None

Duration: 2 days
CCP Eligible: Yes

Course Dates:
- January 17-18
- April 23-24*
- July 31-August 1

*Alternate start times: Module 1 is held from 2:00 PM–3:30 PM CT and Module 2 is held from 2:00 PM–3:15 PM CT.

Individual Modules—Day 1

Course Number:
06-43010-1
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

Analyzing Form 8992: In this workshop, you will learn best practices for multiple reporting options. Examine the data dependencies and impact to taxable income. You will also review reports, diagnostics, and other Corptax-provided tools to support analysis and reconciliation of the GILTI calculation to populate Form 8992.

Objectives:
- Compare the tax return reporting options available for the Form 8992
- Understand data dependencies of calculated amounts throughout the GILTI and FDII calculations
- Distinguish between the types of tools Corptax provides for analyzing the GILTI and FDII calculations reported on Forms 8992 and 8993
- Use various tools to identify the data used in calculating GILTI on the automated Form 8992, including Schedule A
- Use reports and diagnostics to analyze and reconcile data for Form 8992

Individual Modules—Day 2

Course Number:
06-43010-2
Course Time:
10:00 AM–11:15 AM CT
CPE: 1.5

Analyzing Form 8993: In this workshop, you will learn best practices for data-driven review for Form 8993. Examine and gain experience setting up forms for e-file and reviewing the tools available to help you resolve e-file errors early in your preparation process.

Objectives:
- Use various tools to identify the data used in calculating GILTI and FDII deduction on the automated Form 8993
- Use reports and diagnostics to analyze and reconcile data for Form 8993
- Use the Execution Summary Report to analyze e-file data on Form 8992 and 8993

`O` Online Training Course	`S` Self-Study Course (No CPE)	`CES` Continuous Education Subscription Eligible
`C` Classroom Training Course	`S+` Self-Study Course (CPE)	`CCP` Corptax Certified Professional (CCP) Eligible

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Self-Study Course

Module 1—Analyzing Form 8992

In this session, you will learn best practices for multiple reporting options. Examine the data dependencies and impact to taxable income. You will also review reports, diagnostics and other Corptax provided tools to support analysis and reconciliation of the GILTI calculation to populate Form 8992.

Objectives:
- Compare the tax return reporting options available for the Form 8992
- Understand data dependencies of calculated amounts throughout the GILTI and FDII calculations
- Distinguish between the types of tools Corptax provides for analyzing the GILTI and FDII calculations reported on Forms 8992 & 8993
- Use various tools to Identify the data used in calculating GILTI on the automated Form 8992, including Schedule A
- Use reports and diagnostics to analyze and reconcile data for form 8992

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
CCP Eligible: No

Course Number: 06-43010R-1
Prerequisite: None
Advanced Prep: None

CPE: None
Duration: 69 minutes

Module 2—Analyzing Form 8993

In this session, you will learn best practices for data driven review for Form 8993. Examine and gain experience setting up Forms for e-file and reviewing the tools available to help you resolve e-file errors early in your preparation process.

Objectives:
- Use various tools to Identify the data used in calculating GILTI and FDII deduction on the automated Form 8993
- Use reports and diagnostics to analyze and reconcile data for form 8993
- Use the Execution Summary Report to analyze e-File data on Form 8992 and 8993

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
CCP Eligible: No

Course Number: 06-43010R-2
Prerequisite: None
Advanced Prep: None

CPE: None
Duration: 44 minutes

Corptax International Compliance Track

Using Corptax International Reports for Your Domestic Process

O **CES** **CCP**

During this session, examine the types of international reports that are available. Identify and create columnar reports, examine report groups, and determine how to use the reports in print batches. Walk through tracing amounts from domestic forms to the supporting reports.

Objectives:
- Discuss types of international reports available
- Review and create columnar reports
- Examine report groups
- Trace amounts from forms to supporting reports

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-43101
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- February 22
- May 20

Course Time:
2:00 PM–4:00 PM CT

Corptax International Foreign and Domestic Processing for the Intermediate User

O **CES** **CCP**

Once you have mastered the basics of the international compliance process in Corptax International, attending this session expands your system knowledge further. We will discuss topics such as custom appointment, expense factor adjustments, and system tracking of tax attributes. We will also discuss how to code for Interest Netting calculations as well as calculations for GILTI and FDII.

Objectives:
- Develop customized expense apportionment
- Examine overall domestic carryover attributes
- Demonstrate Interest Netting coding
- Generate the GILTI and FDII calculations to report on Form 8992 and Form 8993

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-49000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- February 16
- June 5

Course Time:
10:00 AM–12:00 PM CT

Corptax Other Sessions Track

Using Corptax U.S. State Planner

O **S** **CES**

Calculate your state estimated payments quickly with data already in Corptax. Watch the data flow directly to the vouchers, including consolidated and combined filings. Let Corptax keep up with tax law changes and streamline your analysis.

Objectives:
- Make use of projected or current data to calculate estimated payments
- Base estimates on prior year actual state returns
- Use cushion analysis to keep you from being underpaid or overpaid at tax return filing time
- Examine various computation methods to determine the least tax to pay by state
- Produce State Planner reports and summary forms

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-24100
Prerequisite: None

Advanced Prep: None
CPE: 3.5
Duration: 3 hours
CCP Eligible: No

Course Dates: Sessions are available on request.

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-24100R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 23 minutes
CCP Eligible: No

Administration and Security in Corptax Web—Setup

O **CES** **CCP**

Control access to the Corptax application by creating functional and role-based user groups. Set configuration and retention policies specific to your organization and generate audit reports.

Objectives:
- Locate the minimum system requirements for the Corptax products you license
- Contrast the different methods of controlling access to Corptax products
- Distinguish between an office and an enterprise and how each is typically used
- Define the security settings that control who has access to specific data and features within the system
- Perform setup to ensure access to the Corptax system is limited to authorized users
- Identify Corptax support offerings that are key to your role as Corptax Administrator

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-78000
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 8
- April 10
- July 9

Course Time:
2:00 PM–4:00 PM CT

Corptax Administration and Security—The Maintenance Life Cycle

O **CES** **CCP**

Improve your understanding of how to maintain the Corptax application and database. Become familiar with the steps necessary in each phase of the maintenance life cycle. Gain insight on the tools that Corptax provides to assist you throughout the year.

Objectives:
- List key elements in the maintenance life cycle
- Discuss tools and processes for rolling over your system to the upcoming year
- Identify steps for maintaining your system, collateral, and users throughout the year
- Select policies and tools to help protect your system and data

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-78001
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- February 5

Course Time:
2:00 PM–4:00 PM CT

Corptax Administration—Enhance Your Troubleshooting Skills

O **CES** **CCP**

Are you the person who needs to figure out why something in Corptax doesn't look right? Discover a process for efficiently troubleshooting issues. Examine tools and resources to help reduce the number of interruptions in your work. Discuss key information to include when submitting a support case to ensure issues are resolved in the most expedient manner.

Objectives:
- Identify the key steps to successfully troubleshooting issues
- Use tools provided by Corptax to determine causes and identify resolutions
- Prepare support cases with the appropriate level of detail to expedite resolutions

Delivery Method: Online
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-78005
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- February 16
- June 26

Course Time:
10:00 AM–12:00 PM CT

Corptax Calendar

O **CES**

Manage your due dates and payments for all of your organization's obligations including tax, non-tax, Sales, VAT, and unclaimed property. Track other tasks and user-defined activities all within the same tool.

Objectives:
- Identify the standard obligations you can use in Corptax and Corptax Web
- Create user-defined obligations
- Compare the methods to create a calendar
- Discover how to enter payments due, assign obligations, send e-mail notifications, and more for each task in the calendar
- Examine the integration of sharing data between Corptax and the Corptax Calendar area to eliminate duplicate data entry
- Analyze calendar data in standard and user-defined reports

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-78100
Prerequisite: None

Advanced Prep: None
CPE: 3
Duration: 3 hours
CCP Eligible: No

Course Dates: Sessions are available on request.

See the Big Picture with Corptax Visual Org

O **CES** **CCP**

Corptax Visual Org does a great job creating organization charts, but it can also help you diagnose issues like circular ownership, incorrect entity and domicile types, and incorrect ownership percentages.

Objectives:
- Discover how entity ownership is the basis for the chart structure
- Adapt the chart view to narrow the focus
- Examine how to display different entity properties and ownership chains on the chart and use them for planning
- Run the export of the chart to *.svg* format to use in Microsoft Visio Professional for further analysis

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-78400
Prerequisite: None

Advanced Prep: None
CPE: 1
Duration: 1 hour
CCP Eligible: Yes

Course Dates: Sessions are available on request.

Corptax Pass Through Track

Corptax Partnership—Advanced Series

O CES CCP

Examine the process to complete a Form 1065 and the state partnership returns using the Partnership module of Corptax.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate

Course Number: 06-30000
Prerequisite: None
Advanced Prep: None

Duration: 3 days
CCP Eligible: Yes

Course Dates:
- February 20-22
- May 7-9

Individual Modules—Day 1

Course Number:
06-30000-1
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

Setup: This session walks you through setting up a partnership entity and the data required. Topics include adding and associating partners, descriptive information on returns, and single-member limited liability company and business unit rollups.

Objectives:
- Use the Corptax user interface
- Examine the entity setup needed for partnership

Course Number:
06-30000-2
Course Time:
1:00 PM–3:00 PM CT
CPE: 2

Working with Trial Balance Data, Adjustments, and Allocations: The session walks through ways to review trial balance and apportionment data in the Enter Amounts work area, and how to post automatic and manual adjustments as well as state modifications.

Objectives:
- Examine data in the Corptax database
- Use the Automated Adjustments work area to post amounts and adjust entries
- Enter outside K-1 data
- Interpret state apportionment data for one or more jurisdictions
- Make use of returns and reports
- View estimated tax payments
- Read trial balance reports

Individual Modules—Day 2

Course Number:
06-30000-3
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

Running Special Allocations: Corptax Advanced Partnership allows you to specially allocate partnership income at the K-1 line level, entity level, activity level, and the account and adjustment level. This module walks you through the special allocation process for state and federal returns. We will also show you the K-1 import features available in Corptax Advanced Partnership and composite state returns.

Objectives:
- Import partners, allocation ratios, and K-1 data
- Set up user-defined ratio types
- Create and apply special allocation methods
- Run federal and state allocations
- Prepare composite returns

Course Number:
06-30000-4
Course Time:
2:00 PM–4:00 PM CT
CPE: 2

Reviewing Returns and Reports: This session focuses on working with forms and statements along with auditing amounts on a return and entering data from the return. The K-1 allocation process is also introduced along with K-1 supporting statements.

Objectives:
- Run allocations
- Examine the 1065 and Schedule K returns
- Choose calculation options
- Analyze amounts on a return
- Interpret supporting statements and schedules
- Print forms and schedules

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Individual Modules—Day 3

Course Number:
06-30000-5

Course Time:
10:00 AM–11:30 AM CT

CPE: 1.5

Using Advanced Features: You will learn how to take advantage of tiering and the sophisticated ownership tracking and footnote capabilities of Corptax. You will discover how to enter ownership changes and create a variety of footnotes capable of pulling allocations from the return and user-defined categories.

Objectives:
- Enter a change of ownership
- Transfer interest to a new partner
- Create footnotes and examine them in the return
- Set up and process partner tiering
- Process allocations

Preparing K-2 and K-3 in Corptax

O **S** **CES** **CCP**

Better understand and adhere to the updated filing requirements for the new K-2 and K-3 schedules as part of Form 1065, 8865, or 1120-S filings! Learn how to properly complete and file the K-2 and K-3 schedules in Corptax, including setup through e-file.

Objectives:

- Review the new IRS filing requirements for foreign activities of partnerships
- Assess the setup required in Corptax for filing K-2 and K-3 schedules
- Enter and allocate data in the K-2 specific accounts
- Identify new calcs and forms available
- Understand how to e-file schedules

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-30100
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- March 25
- May 21

Course Time:
1:00 PM–3:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-30100R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 65 minutes
CCP Eligible: No

Corptax Provision Track

Corptax Provision Track

Introduction to Corptax Provision for New Users

`O` `S` `CES` `CCP`

New to Corptax and need to prepare provision? Learn how to navigate Corptax and Corptax Web to access the tools and features you need for the provision process. Get familiar with the key data profiles, data entry workpapers, and reporting features that help you automate your process and analyze your data. Get organized, find in-product help resources, and feel confident in preparing both federal and state provision!

Objectives:
- Review basic navigation for Corptax and Corptax Web
- Discover resources and tools available to assist you with the provision process
- Learn how data flows through Corptax for both the federal and state provision process
- Identify key data profiles used in the provision process
- Enter federal and state data using various data entry workpapers
- Analyze provision reports

Online Course

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-19960
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 4
- February 27
- March 12* (2:00 PM–4:00 PM CT)
- April 9* (2:00 PM–4:00 PM CT)
- May 8
- July 1

Course Time:
10:00 AM–12:00 PM CT

Self-Study Course

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-19960R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: TBD
CCP Eligible: No

Preparing Provision in Corptax

`C` `CES` `CCP`

This introductory course explores the first step in the provision to return cycle, provision reporting. You will practice the provision cycle first hand, starting with reviewing and practicing provision setup and data entry and continuing through reporting.

Objectives:
- Discover how to use Corptax to assist you with your provision process
- Examine the whole provision cycle from setup through reporting
- Maximize the use of Corptax to assist with the provision process
- Improve processes to make the provision process more efficient

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-19990
Prerequisite: None

Advanced Prep: None
CPE: 15.5
Duration: 2 days
CCP Eligible: Yes

Course Dates for Dallas, TX: Check back for future dates

Corptax Provision Track

Corptax Tax Contingency

O **CES** **CCP**

Find out how Corptax Tax Contingency (formerly known as Corptax FIN 48) addresses the recognition, measurement, and disclosures of all tax positions taken or expected to be taken.

Objectives:
- Recognize how to navigate through the Corptax Tax Contingency area
- Explain the profiles and its components needed to support the tax contingency area
- Discover the various workpapers available to ensure that your organization accurately recognizes, measures, and discloses all of the data relevant to your tax positions

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-19994
Prerequisite: None

Advanced Prep: None
CPE: 1.5
Duration: 1.5 hours
CCP Eligible: Yes

Course Dates:
- February 7

Course Time:
2:00 PM–3:30 PM CT

Maximize Corptax Provision Capabilities

O **CES** **CCP**

Explore Corptax Provision advanced features, including how the Interim, Intercompany, and Deferred Scheduler workpapers elevate your provision process. Learn the most efficient ways to create and use deferred and adjustment-specific tax rates. Review how Corptax calculates the impact of translation rate changes. Finally, discover how to build customized workflows and workflow packages to streamline your provision process.

Objectives:
- Process Interim Provision workpapers
- Create foreign deferred tax rates and adjustment-specific rates
- Use the Deferred Scheduler workpapers
- Work with the impact of translation rates in the provision
- Record intercompany transactions for gain/(loss) recognition
- Build customized workflows and workflow packages

Delivery Method: Online
Subject Area: Taxes
Course Level: Advanced
Course Number: 06-19980
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- March 14
- July 30* (2:00 PM–4:00 PM CT)

Course Time:
10:00 AM–12:00 PM CT

Corptax Provision Federal Series

S CES

Module 1: Corptax Provision Setup
This session focuses on the setup items that are specific to provision as well as the workpaper setup that needs to be completed.

Objectives:
- Discover the setup items that are essential to the provision process
- Examine the provision workpaper setup that has to be completed

Delivery Method: Self-Study   **Advanced Prep:** None
Subject Area: Taxes   **CPE:** None
Course Level: Intermediate   **Duration:** TBD
Course Number: 6-751S   **CCP Eligible:** No
Prerequisite: None

Module 2: Using Corptax Provision
This session walks you through the data entry and reporting aspects of the provision process on a domestic and global basis.

Objectives:
- Identify different data entry techniques that are available in Corptax Provision

Delivery Method: Self-Study   **Advanced Prep:** None
Subject Area: Taxes   **CPE:** None
Course Level: Intermediate   **Duration:** TBD
Course Number: 6-752S   **CCP Eligible:** No
Prerequisite: None

Module 3: Provision Rollover
Discover how the rollover feature in provision provides an efficient method of rolling data from one period to the next.

Objectives:
- Build batches to assist you with ensuring reports are always up to date
- Analyze provision reports
- Compare the difference between the annual rollover and a period to period rollover

Delivery Method: Self-Study   **Advanced Prep:** None
Subject Area: Taxes   **CPE:** None
Course Level: Intermediate   **Duration:** TBD
Course Number: 6-753S   **CCP Eligible:** No
Prerequisite: None

Module 4: Interim Provision Reporting
Recognize how Corptax can help you with your interim provision reporting process using Advanced Interim reporting.

Objectives:
- Summarize interim provision definitions
- Outline the process workflow for interim reporting
- Discover how to enter data and review reports for the interim process

Delivery Method: Self-Study   **Advanced Prep:** None
Subject Area: Taxes   **CPE:** None
Course Level: Intermediate   **Duration:** TBD
Course Number: 6-754S   **CCP Eligible:** No
Prerequisite: None

O Online Training Course   S Self-Study Course (No CPE)   CES Continuous Education Subscription Eligible
C Classroom Training Course   S+ Self-Study Course (CPE)   CCP Corptax Certified Professional (CCP) Eligible

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Corptax Provision State Series

S **CES**

Module 1: Blended Rate
This session helps you navigate through to a blended rate calculation. Using a case study, this session also walks you through setting up and analyzing your data as well as calculating a blended state rate.

Objectives:
- Examine the blended rate method
- Create or select the necessary Corptax profiles and workpapers
- Use various workpapers to enter apportionment, adjustments, and tax attributes
- Choose the appropriate Batch base on the Blended State Provision method
- Evaluate the State Provision results

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 6-761S
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: TBD
CCP Eligible: No

Module 2: Corptax State Provision – State by State
This session helps you navigate through to a state-by-state rate calculation. Using a case study, this session also walks you through defining key profiles and setting up workpapers as well as calculating a state-by-state rate.

Objectives:
- Examine the state-by-state calculation method
- Create or select the necessary Corptax profiles and workpapers
- User various workpapers to enter apportionment, adjustments, and tax attributes
- Choose the appropriate Batch base on the detailed state-by-state provision method
- Evaluate the State provision results

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Intermediate
Course Number: 6-762S
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: TBD
CCP Eligible: No

| O | Online Training Course | S | Self-Study Course (No CPE) | CES | Continuous Education Subscription Eligible |
| C | Classroom Training Course | S+ | Self-Study Course (CPE) | CCP | Corptax Certified Professional (CCP) Eligible |

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Corptax Provision Workshop Series for Intermediate Users

O **CES** **CCP**

Take advantage of the automation, sophisticated calculations, options, and intuitive interface with Corptax Provision. Discover how to efficiently calculate federal and state provision, from setup to reporting to rollover.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate

Course Number: 06-19970
Prerequisite: None
Advanced Prep: None

Duration: 3 days
CCP Eligible: Yes

Course Dates:
- January 23-25
- March 19-21
- June 5-7

Individual Modules—Day 1

Course Number:
06-19970-1
Course Time:
10:00 AM–12:00 PM CT
CPE: 3

Setup: Prepare to calculate a federal and state provision by setting up data profiles, using workpapers to adjust options and organize data, and reviewing custom workflow and assignments.

Objectives:
- Discover how to set up key data profiles for Corptax Provision
- Learn how to use the Corptax Provision setup workpapers
- Review custom workflow and assignments

Individual Modules—Day 2

Course Number:
06-19970-2
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

Data Entry: Understand the different methods of bringing trial balance, apportionment amounts, adjustments, and other data into Corptax for the provision process. Learn how to determine which method makes the most sense for your situation, whether manual entry, workpapers, copy and paste, import, or Corptax Office.

Objectives:
- Enter and review apportionment data
- Enter adjustments using the single data entry workpapers
- Discover how to import provision adjustments using Corptax Office
- Explain how to enter other data used in the provision process

Individual Modules—Day 3

Course Number:
06-19970-3
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

Reporting and Rollover: Ramp up your provision reporting with easy execution and printing via batch processing. Generate comparative reporting, subtotal and sort data, and create rollups. See how Corptax Office data analytics provides quick, robust analysis of underlying data. Then learn how to prepare your provision data for the new year with the rollover process.

Objectives:
- Discover how to create and process batches
- Analyze provision reports
- Process both annual and period-to-period rollovers

Corptax U.S. Compliance Track

Corptax U.S. Compliance Track

Introduction to Corptax

S **CES**

See the power of Corptax at your fingertips. Learn about the first and only single system on the market for end-to-end tax compliance and reporting. See how unmatched automation aligns processes, enhances speed and transparency, improves analytics, and lowers risk across the tax lifecycle.

Objectives:
- Learn the process and information flow within Corptax
- Identify the basic navigational tools and how to use the Corptax interface
- Learn how to create or modify profiles to suit your company's processes
- Discover the methods for entering amounts and automate tax preparation processes
- Assess the accuracy of your federal 1120 return by reviewing Corptax reports; then use Corptax features to modify data as needed

Delivery Method: Self-Study
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-20001R
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 25 minutes
CCP Eligible: No

Corptax U.S. Compliance—Basic Federal and State

C **CES** **CCP**

Discover the building blocks and inter-relationships between the federal and state processing. Create entities and entity groups, understand accounts and adjustments, review financial data, and make adjustments to both federal and state data on your way to preparing federal and state returns.

Objectives:
- Examine the data process flow for federal and state returns
- Create profiles used to organize data for returns and reports
- Analyze financial statement data
- Build a federal and state return

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Basic
Course Number: 03-20000
Prerequisite: None

Advanced Prep: None
CPE: 19.5
Duration: 2.5 days
CCP Eligible: Yes

Course Dates for Dallas, TX:
- March 5-7

Course Time:
- Day 1: 8:30 AM–4:30 PM CT
- Day 2: 8:30 AM–4:30 PM CT
- Day 3: 8:30 AM–12:00 PM CT

Note: A session may be scheduled at the same location following this course.

Corptax Groups and Post Amounts Simplified

O **CES** **CCP**

Examine the setup and uses of entity groups, custom groups, and custom ranges. Utilize the post amounts function to enhance your reporting and analysis needs.

Objectives:
- Compare and contrast entity groups, custom groups, and ranges
- Apply groups and ranges to returns and reports
- Identify Post Amounts uses
- Use Post Amounts to enhance reporting

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-76100
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- January 29
- July 30

Course Time:
2:00 PM–4:00 PM CT

Corptax U.S. Compliance - Intermediate Federal Topics

O **CES** **CCP**

Learn how to prepare the appropriate forms and schedules within your federal tax return, review diagnostics and post back calculated values to be used for analysis.

Objectives:
- Examine the Corptax tools inherent in the federal return process
- Use Corptax tools to drive data to the appropriate forms and schedules and provide additional information as required by the IRS
- Identify the Corptax tools used to analyze data and enhance reports

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-20151
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- May 23

Course Time:
1:00 PM–3:00 PM CT

Corptax U.S. Compliance: Intermediate State Topics

O **CES** **CCP**

Enhance the efficiency of the state return preparation process with key Corptax features and function. Compare the differences between separate, combined, or consolidated state returns.

Objectives:
- Examine Corptax tools inherent in the state return process
- Distinguish between the different types of accounts used in state returns
- Contrast differences between separate vs. group state return preparation
- Inspect various calculations and drill-down features used to prepare state returns
- Identify key steps and solve unique issues in the state return preparation process

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-23151
Prerequisite: None

Advanced Prep: None
CPE: 2
Duration: 2 hours
CCP Eligible: Yes

Course Dates:
- June 24

Course Time:
1:00 PM–3:00 PM CT

U.S. Compliance Using Corptax—Basic Federal Series

`O` `S+` `CES` `CCP`

Online Course

Build the foundational pieces necessary for the federal return process. Review financial data, make adjustments, and recognize helpful tools that streamline your federal return preparation process.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic

Course Number: 06-20000
Prerequisite: None
Advanced Prep: None

Duration: 2 days
CCP Eligible: Yes

Course Dates:
- January 10-11
- March 19-20
- May 21-22
- July 31-August 1

Individual Modules—Day 1

Course Number:
06-20000-1
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

Basic Navigation and Profiles: This session demonstrates the key components necessary for the federal return process. Discover the tools and features available in Corptax to organize your data and prepare federal returns.

Objectives:
- Recognize the steps of the process flow for federal returns
- Navigate using tools, ribbons, and grids
- Define entity profile information
- Identify the key profiles and how they are used to organize data

Course Number:
06-20000-2-v2
Course Time:
2:00 PM–3:00 PM CT
CPE: 1

Entering and Reviewing Trial Balance Data and Off-Trial Balance Data: Discover different methods for entering data for trial balance and off-trial balance data into Corptax. This session shows how you can review your data for accuracy and make changes.

Objectives:
- Maximize the tools available to ensure the financial statement data is correctly loaded
- Explain the difference between standard journal entry and Corptax journal entry
- Choose groups to filter data for review

Individual Modules—Day 2

Course Number:
06-20000-3-v2
Course Time:
10:00 AM–11:30 PM CT
CPE: 1.5

Working with Automated Adjustments: Corptax allows you to automate some of your processes and leverage the automation across all of your product licenses. Automated adjustments give you the ability to streamline your posting of adjustments for book and tax in one step. Apply what you see in this session to your tax preparation to save time and increase the efficiency and accuracy of your data.

Objectives:
- Identify the benefits in using a three-sided entry vs. a single-sided entry
- Explore manual data entry, post automated adjustments, and modify amounts from the return
- Simplify the review process using the basic tools and grids

Course Number:
06-20000-4
Course Time:
2:00 PM–4:00 PM CT
CPE: 2

Reviewing Reports and Preparing a Federal 1120 Separate and Consolidated Return: This session is one of the final steps in preparing a separate Federal 1120 return. Assess the accuracy of the return by reading reports. Then, use Corptax tools to check the accuracy of your data and modify amounts.

Objectives:
- Discover the ability to modify amounts from a line item
- Identify the appropriate calculation options for the federal return
- Demonstrate use of the form preparation guidelines
- Implement the federal return process flow and use groups to build your consolidated return
- Complete a review of separate returns within a consolidated return and modify amounts
- Select appropriate calculation options for the federal return at the consolidated level
- Demonstrate printing returns and reports

`O` Online Training Course
`C` Classroom Training Course
`S` Self-Study Course (No CPE)
`S+` Self-Study Course (CPE)
`CES` Continuous Education Subscription Eligible
`CCP` Corptax Certified Professional (CCP) Eligible

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Self-Study Course

Build the foundational pieces necessary for the federal return process. Review financial data, make adjustments, and recognize helpful tools that streamline your federal return preparation process.

Module 1—Basic Navigation and Profiles

This session demonstrates the key components necessary for the federal return process. Discover the tools and features available within Corptax to organize your data and prepare federal returns.

Objectives:

- Recognize the steps of the process flow for federal returns
- Navigate using tools, ribbons, and grids
- Create entity profile information
- Identify the key profiles and how they are used to organize data

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-20000S-1
Prerequisite: None
Advanced Prep: None

CPE: 1.5
Duration: Self-Paced

Module 2—Entering and Reviewing Trial Balance Data and Off Trial Balance Data

Discover the different methods for entering data for trial balance and off-trial balance data into Corptax. This session shows how you can review your data for accuracy and make changes.

Objectives:

- Discover the tools available to ensure the financial statement data is correctly loaded
- Recognize the difference between standard journal entry and Corptax journal entry
- Choose groups to filter data for review

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-20000S-2
Prerequisite: None
Advanced Prep: None

CPE: 1
Duration: Self-Paced

Module 3—Working With Automated Adjustments

Corptax allows you to automate some of your processes and leverage across all of your product licenses. Automated Adjustments give you the ability to streamline your posting of adjustments for book and tax in one step. Apply what you see in this session to your tax preparation processes and save time, increase efficiency, and accuracy of your data.

Objectives:

- Explore how to perform manual data entry, post automated adjustments, and modify amounts from the return
- Listen how you can simplify the review process using the basic tools and grids

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-20000S-3
Prerequisite: None
Advanced Prep: None

CPE: 1.5

Duration: Self-Paced

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Module 4—Reviewing Reports and Preparing a Federal 1120 Separate and Consolidated Return

This session is one of the final steps in preparing your separate or consolidated Federal 1120 return. Assess the accuracy of the return by reading reports. Then, use Corptax tools to check the accuracy of your data and modify amounts.

Objectives:

- Discover how to modify amounts from a line item
- Identify the appropriate calculation options for the federal return
- Examine the use of the form preparation guidelines
- Interpret the federal return process flow and use groups to build your consolidated return
- Recognize how to review of separate returns within a consolidated return and modify amounts
- Determine the appropriate calculation options for the federal return at the consolidated level
- Find out how to print returns and reports

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-20000S-4
Prerequisite: None
Advanced Prep: None

CPE: 1.5
Duration: Self-Paced

Corptax U.S. Compliance Track

Corptax U.S. Compliance—Basic State Series

`O` `S+` `CES` `CCP`

Online Course

Get familiar with state apportionment data, state modifications, and helpful data review reports before preparing separate and combined/consolidated returns. Streamline your filing process with resources available at your fingertips.

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic

Course Number: 06-23000
Prerequisite: None
Advanced Prep: None

Duration: 1.5 days
CCP Eligible: Yes

Course Dates:
- February 21-22
- April 24-25
- June 19-20

Individual Modules—Day 1

Course Number:
06-23000-1
Course Time:
10:00 AM–11:30 AM CT
CPE: 1.5

State Overview: This session summarizes the state C Corporation return process and explains which entity information you need to review annually, how to use locations to distinguish data, and how to use accounts to keep state data separate from federal data. It also covers the overall process of producing a state return.

Objectives:
- Outline how common user experience, common database, and common administration drive efficiency in Corptax
- Show steps of the state return process
- Illustrate basic Corptax tools, such as ribbons and grids to navigate through the application
- Identify the key profiles used in the state return process

Course Number:
06-23000-2
Course Time:
1:00 PM–3:00 PM CT
CPE: 2

State Data and Reports: If you prepare state returns, then entering apportionment data and state modifications is a fact of your life. Discover how you can query apportionment data, enter apportionment data for multiple locations, enter common state modifications (i.e., state estimated payments, state taxes based on income, and interest on U.S. obligations), enter state-specific modifications, and enter federal and state bonus depreciation amounts.

Objectives:
- Analyze various options for controlling the data that displays on the Enter Amounts window
- Examine state apportionment data and export amounts to Excel
- Make use of account data for:
  - Apportionment
  - State-specific modifications
  - Common state modifications
  - Federal and state bonus depreciation
  - State NOLs
- Compare apportionment and state modification reports

Individual Modules—Day 2

Course Number:
06-23000-3
Course Time:
10:00 AM–12:00 PM CT
CPE: 2

State C Corporation Return Preparation: The last step of the state return process is to prepare and review the return. During this session, learn how to launch and examine the forms and Corptax Form Preparation Guidelines for the Florida Form F-1120. Then, learn how to review and apply tax return options as well as the way to prepare a combined or consolidated return.

Objectives:
- Examine income tax reports and return calculations in Corptax Web
- Review the Form Preparation Guidelines
- Choose calculation options
- Interpret the state return calculation structure
- Audit and trace a return item, including viewing calculated value and database amounts
- Analyze and enter amounts on the return
- Finalize state returns, including:
  - Verifying amounts
  - Adding user-defined statements
  - Posting state return results
  - Creating a State Summary report
- Create a consolidated state return

Self-Study Course

Get familiar with state apportionment data, state modifications, and helpful data review reports before preparing separate and combined/consolidated returns. Streamline your filing process with resources available at your fingertips.

Module 1—State Overview

This session summarizes the state C Corporation return process and explains which entity information you need to review annually, how to use locations to distinguish data, and how to use accounts to keep state data separate from federal data. It also covers the overall process of producing a state return.

Objectives:
- Discover how common user experience, common database, and common administration drive efficiency in Corptax
- Examine steps of the state return process
- Identify basic tools you can use in Corptax to navigate through the application
- Identify key profiles and how they are used in the state return process

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-23000S-1
Prerequisite: None
Advanced Prep: None

CPE: 2
Duration: Self-Paced

Module 2—State Data and Reports

If you prepare state returns, then entering apportionment data and state modifications is a fact of your life. Discover how you can query apportionment data, enter apportionment data for multiple locations, enter common state modifications (i.e., state estimated payments, state taxes based on income, and interest on U.S. obligations), enter state-specific modifications, and enter federal and state bonus depreciation amounts.

Objectives:
- Discover options for controlling the data that displays on the Enter Amounts window
- Examine state apportionment data and export amounts to Excel
- Recognize how to use of account data for apportionment, State-specific modifications, common state modifications, federal and state bonus depreciation, and state NOLs
- Differentiate between apportionment and state modification reports

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-23000S-2
Prerequisite: None
Advanced Prep: None

CPE: 1.5
Duration: Self-Paced

Module 3—State C Corporation Return Preparation

The last step of the state return process is to prepare and review the return. During this session, recognize how to launch and examine the forms and Corptax Return Instructions for a separate return. Then, listen how to review and apply tax return options as well as the way to prepare a combined or consolidated return.

Objectives:

- Examine income tax reports and return calculations
- Interpret the form preparation guidelines
- Identify calculation options
- Interpret the state return calculation structure
- Find out how to audit and trace a return items
- Determine how to analyze and enter amounts on the return
- Recognize how to finalize state returns
- Discover how to create a consolidated state return

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
CCP Eligible: Yes

Course Number: 06-23000S-3
Prerequisite: None
Advanced Prep: None

CPE: 1.5
Duration: Self-Paced

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

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Corptax U.S. Compliance Track

Setting Up Automated Adjustments Using Corptax Web Workshop

O **CES** **CCP**

Discover how Corptax automated adjustment workpapers calculate and present adjustments consistently across your organization to expedite processes. You'll learn and apply key concepts with some exercises in a lab environment following the session.

Objectives:
- Build standardized workpapers with a consistent presentation that include processing controls
- Structure naming conventions for automated adjustments
- Choose the appropriate model type to apply to an automated adjustment
- Determine the appropriate source and post accounts for an automated adjustment
- Construct an automated adjustment workpaper for each model type
- Construct workpapers you can share across multiple enterprises
- Decide on the appropriate security rights to create an automated adjustment

Delivery Method: Online
Subject Area: Taxes
Course Level: Basic
Course Number: 06-59000
Prerequisite: None

Advanced Prep: None
CPE: 1.5
Duration: 1.5 hours
CCP Eligible: Yes

Course Dates: Check back for future dates

Using Corptax Automated Adjustments to Enhance Your Processes

O **CES** **CCP**

Learn how to process adjustments more efficiently within your organization. Explore various methods to incorporate automated adjustment workpapers into your business processes. Build processes that handle adjustments efficiently and with less risk of error.

Objectives:
- Compare the model types available for automated adjustments
- Assess the model type and the adjustment code to determine the best fit
- Apply the adjustment data or imported data to the appropriate automated adjustment workpaper
- Select and associate a method or combination of methods for processing adjustment workpapers

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: 06-59010
Prerequisite: None

Advanced Prep: None
CPE: 1.5
Duration: 1.5 hours
CCP Eligible: Yes

Course Dates:
- January 16
- May 17
- July 11

Course Time:
1:00 PM–2:30 PM CT

Corptax U.S. Virtual Account – Net Income Per Books (Demo)

S **CES**

This video will demonstrate the power of virtual accounts by automating the posting of Net Income per Books.

Delivery Method: Self-Study
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-20000R1
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: TBD
CCP Eligible: No

Corptax U.S. Compliance Federal Considerations

S **CES**

Part 1
Learn how to prepare the appropriate forms and schedules within your federal tax return, review diagnostics and post back calculated values to be used for analysis.

Objectives:
- Examine the Corptax tools inherent in the federal return process
- Review additional items related to taxable income:
  - Charitable Contributions
  - Depreciation and Amortization (Form 4562)
  - Gains and Losses (Sch M-3, Form 4797 & Sch D)

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-20150R-1
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 87 minutes
CCP Eligible: No

Part 2
Learn how to prepare the appropriate forms and schedules within your federal tax return, review diagnostics and post back calculated values to be used for analysis.

Objectives:

- Review additional items for forms and schedules:
  - Underpayment of Estimated Taxes (Form 2220)
  - Affiliation Schedule (Form 851)
  - General Business Credit (Form 3800)
- Explor the Corptax tools to analyze data and enhance reports

Delivery Method: Self-Study
Subject Area: Taxes
Course Level: Basic
Course Number: 06-20150R-2
Prerequisite: None

Advanced Prep: None
CPE: None
Duration: 87 minutes
CCP Eligible: No

O Online Training Course
C Classroom Training Course
S Self-Study Course (No CPE)
S+ Self-Study Course (CPE)
CES Continuous Education Subscription Eligible
CCP Corptax Certified Professional (CCP) Eligible

Corptax Certified Professional Program

Why Get Certified?

Demand for Corptax experts continues to grow. By getting certified, you identify yourself as one of those experts. Moreover, you've told us that we've given you a great deal of power: to customize, to integrate, and to complete your entire tax life cycle using the Corptax suite of products. Our goal is to help you take full advantage of that power.

By earning a Corptax certification, you can:
- Use the full potential of Corptax with best-in-class skills
- Grow your career by setting yourself apart from the crowd
- Join an exclusive community of Corptax Certified Professionals

3 Steps to Certification

Step 1: Pick Your Certification

Determine the right certification for you by consulting the **Program Details**. We offer four certifications covering a variety of Corptax products and areas of the tax life cycle.

Step 2: Get Ready

Are you ready for the exam now?
You may have on-the-job experience and be ready to take the exam today. If so, skip to *Step 3: Get Certified.*

Do you want to take training to help you prepare?
You may elect to bolster your knowledge with additional preparations and training. We offer learning options ranging from certification preparatory training to an affordable Continuous Education Subscription. In our training courses, you'll learn critical skills and gain an understanding of exam materials.

Step 3: Get Certified

Once your exam preparations are complete, you can register for the certification program(s) of your choice. Each certification examination includes a knowledge exam and a case study to certify mastery of skills.

Corptax Certification Preparation Courses

Training is not required to become a Corptax Certified Professional. However, we offer certification preparation training courses that may be helpful for those looking for additional preparation for the certification exam. The case study exam is held on the last day of the preparation course. The price of the course includes the fee for the corresponding exams.

Certification preparation training is scheduled at our Education Centers or can be arranged at a mutually agreeable location. If held at an alternate location, out-of-pocket costs, such as instructor travel and shipping (materials and learning laptops, if utilized) expenses, will be billable in addition to the certification fees.

Note: For more details, view the full **Program Details**.

To register for a session, follow the steps in the .

Corptax Certification

Certification Prep: Corptax Certified Professional—Provision

C **CCP**

This session provides core training with respect to provision. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the certification exam.

Areas covered in this certification program include:
- Completing the tax life cycle using Corptax
- Overview of data collection methods
- Setting up and using Corptax Provision products
  - Corptax Provision
  - Corptax State Provision
  - Corptax Tax Contingency
- Other topics including interim reporting and rollover
- Provision-related tips and troubleshooting

The case study exam will be held on the last day of the prep course. The prep course price includes the cost of the certification exams.

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: C-19990
CCP Eligible: Yes

Prerequisite: 2 years of product experience recommended
Advanced Prep: None
CPE: 28.5
Duration: 5 days

Course Dates for Dallas, TX:
Check back for future dates

Course Time:
Monday–Thursday:
9:00 AM–4:30 PM CT

Friday:
7:30 AM–2:30 PM CT

Certification Prep: Corptax Certified Professional—U.S. Compliance

C **CCP**

This session provides core training with respect to Federal and State Compliance. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the certification exam.

Areas covered in this certification program include:
- Basic federal and state compliance
- Electronic filing of federal and state returns
- Intermediate federal and state considerations
- Mixed return processing
- C Corporation and e-filing tips and troubleshooting

The case study exam will be held on the last day of the prep course. The prep course price includes the cost of the certification exam.

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: C-20000
CCP Eligible: Yes

Prerequisite: 2 years of product experience recommended
Advanced Prep: None
CPE: 28.5
Duration: 5 days

Course Dates for Dallas, TX:
Check back for future dates

Course Time:
Monday–Thursday:
9:00 AM–4:30 PM CT

Friday:
7:30 AM–2:30 PM CT

Corptax Certification

Certification Prep: Corptax Certified Professional—Pass Through Compliance

C CCP

This session provides core training with respect to Partnership and S Corporation Federal and State Compliance. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the certification exam.

Areas covered in this certification program include:
- Using the advanced partnership features to the full extent
- Federal and state partnership compliance
- Preparing Form 8825 for advanced partnership
- Electronic filing of partnership federal and state returns
- Advanced S Corporation compliance
- Partnership e-filing tips and troubleshooting

The case study exam will be held on the last day of the prep course. The prep course price includes the cost of the certification exam.

Delivery Method: Online
Subject Area: Taxes
Course Level: Intermediate
Course Number: C-30000
CCP Eligible: Yes

Prerequisite: 2 years of product experience recommended
Advanced Prep: None
CPE: 21.5
Duration: 4 days

Course Dates for Dallas, TX:
Check back for future dates

Course Time:
Tuesday–Thursday:
9:00 AM–4:30 PM CT

Friday:
7:30 AM–2:30 PM CT

Certification Prep: Corptax Certified Professional—International Compliance

C CCP

This session provides core training with respect to International Compliance. Attend this session to make sure your knowledge and skills are up to date and you're prepared to take the certification exam.

Areas covered in this certification program include:
- Basic international compliance
- Electronic filing of federal and international returns
- Intermediate international compliance considerations
- International and e-filing tips and troubleshooting
- Preparing forms 5471, 1118, 8858, 5472, 8865, 8992, and 8993

The case study exam will be held on the last day of the prep course. The prep course price includes the cost of the certification exam.

Delivery Method: Classroom
Subject Area: Taxes
Course Level: Intermediate
Course Number: C-40000
CCP Eligible: Yes

Prerequisite: 2 years of product experience recommended
Advanced Prep: None
CPE: 28.5
Duration: 5 days

Course Dates for Dallas, TX:
Check back for future dates

Course Time:
Monday–Thursday:
9:00 AM–4:30 PM CT

Friday:
7:30 AM–2:30 PM CT

Corptax Certification Exam Dates and Renewal

To become a Corptax Certified Professional in any topic, you must successfully complete a knowledge exam and case study to ensure efficient and quality product usage. There are no prerequisites to sign up for a certification exam.

Certification Fees

The certification fee is per certification topic. Fee includes unlimited attempts for the knowledge exam and two attempts at the case study. Subsequent attempts for the case study are available.

Retake Policy

You are allowed unlimited retakes of the knowledge exam and one free retake of the case study. Subsequent test attempts for the case study incur a retake fee per exam. You must pass both exams within 6 months of each other.

Renewal Requirements

- Complete 10 CPE credits from CCP-eligible training annually, beginning in 2021
  - CCP-eligible courses in this schedule include the following indicator: CCP
- Pass annual knowledge exam
- After three years, remit applicable certifications fees, and pass knowledge and case study exams, starting in 2025

Exam Dates

To register for a knowledge exam or case study, log in to **Connections**, click **Learn**, click **Education Schedule**, and filter the category to *Certified Professional.*

You may take the knowledge exam at any time. The case study is available on the following dates:

Date	Start Time	End Time	Delivery Method
January 26	12:00 PM	4:30 PM	Online
February 18	12:00 PM	4:30 PM	Online
March 27	12:00 PM	4:30 PM	Online