



# Corptax Certified Professional: Pass Through Compliance Program Details

The Corptax Certified Professional: Pass Through Compliance Program is designed to certify your Corptax knowledge and skills for pass-through compliance. (Certifications use the latest release of Corptax products.) Our certification programs cover core product usage along with Corptax-recommended best practices. Areas covered in this certification program include:

- Federal and state partnership compliance
- Preparing Form 8825
- Electronic filing of partnership federal and state returns
- S Corporation compliance
- Partnership e-filing tips and troubleshooting

## What's in it for me?

- **Stand out from the crowd** with certified Corptax skills for personal and professional growth.
- **Join an exclusive community** of Corptax Certified Professionals.
- **Be recognized** as a Corptax Certified Professional on corptax.com and use the Corptax Certified logo on your business cards and email signatures.
- **Earn continuing professional education (CPE) credits** for classroom and online training sessions completed as part of the certification.

## What do I have to do to be certified?

- Successfully complete a knowledge exam to certify skill in efficient product usage. To register, go to **Learn, Education Schedule** in [CSC Connections](#) and filter the category to *Certified Professional*. You may take the knowledge exam at any time. You must earn at least a 75% score to pass.
- Successfully complete a case study to certify practical application of the process. To register, go to **Learn, Education Schedule** in [CSC Connections](#) and filter the category to *Certified Professional*. Register to take the case study exam on an available date. You must earn at least a 75% score to pass.
- There is a certification fee for each certification topic. The fee includes unlimited attempts for the knowledge exam and two attempts for the case study. Subsequent attempts for the case study are available at an additional cost. Please contact us at [education@corptax.com](mailto:education@corptax.com) for pricing details.
- You must pass both exams within 6 months of each other.

## How do I maintain my certification?

The certification is valid for three years if you meet the following annual requirements:

- Complete 10 CPE credits from CCP-eligible training. CPE credits may count toward more than one topic.
- Pass an annual renewal exam per topic.
- Following the three-year period, re-select the program of interest, successfully complete the certification knowledge exam and case study, and pay applicable certification fees to begin a new three-year term.

## What training is available?

- Corptax offers a wide selection of courses for both new and advanced users, most of which are eligible for CPE credit. All sessions are taught by experienced trainers and designed to help address real-life issues through case studies.
- We also recommend a week-long certification preparation program to assess that your knowledge and skills are up to date prior to taking the certification exam. For customers who have a Continuous Education Subscription, the cost of these prep courses are included with the subscription. The certification exams are not part of the prep courses and you must register for them separately. Certification preparation training is scheduled at our training centers or a mutually agreeable location with the participant and Corptax. If held at an alternate location, out-of-pocket costs, such as instructor travel, will be billed in addition to the certification fees.

## Program Description

The Corptax Certified Professional: Pass Through Compliance Program is intended for an individual who has a minimum of two years of compliance and product experience, including practical application of the skills and concepts noted in the exam outline below. The candidate is not required to complete training before the exam; however, Corptax offers several training resources, and we recommend that the candidate also study the materials from available courses. The candidate should be able to perform the tasks in the exam outline successfully.

## About the Exam

The Corptax Certified Professional: Pass Through Compliance Exam is case study-based and composed of the following characteristics:

Knowledge Exam		Case Study Exam	
Purpose:	To certify knowledge of efficient and quality product usage	Purpose:	To certify practical application of the compliance process
Content:	40 multiple-choice questions	Content:	Multi-part case study exam executed on a learning environment provided by Corptax Education Services
Time allotted to complete:	60 minutes	Time allotted to complete:	Up to four hours
Passing score:	75%	Passing score:	75%
References:	You may reference hard copy materials/documentation during the exam	References:	You may reference hard copy materials/documentation during the exam

## Exam Outline

The Corptax Certified Professional: Pass Through Compliance Exam measures a candidate's knowledge and skills related to the objectives listed below. A candidate should have hands-on experience with Corptax products and have demonstrated application of each of the following features and functions.

Knowledge Exam Topic	Weighting	Case Study Exam Section	Weighting
Setup	28%	Set Up New Entities	19%
Trial Balance, Adjustments, and Allocations	12%	Import Trial Balance and Apportionment Data	2%
Reviewing Returns and Reports	12%	Post Automatic and Manual Adjustments	7%
Special Allocations	13%	Enter Off-Trial Balance Data	2%
Features	13%	Enter State Modifications	3%
Preparing Form 8825 in Corptax	5%	Review White Paper, Printing, & Posting	9%
S Corporation Compliance	4%	Enter Special Allocations	9%
K-2/K-3 Processing	5%	Enter Transfers of Interest and Create Footnotes	12%
Partnership e-File	8%	Process Allocations	18%
<b>Total</b>	<b>100%</b>	Prepare Federal and State Returns	13%
		e-File a State Return	6%
		<b>Total</b>	<b>100%</b>