

# 2019 Conference Curriculum

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Looking for more information related to the sessions available at CONNECT 2019? Review the details for each session, including the planned content, objectives, and the dates and times that each session is available.

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# Conference Agenda

CONNECT 2019 is a must-attend event for tax technology professionals. Join us in San Diego, CA to learn real-world strategies to improve your organization's productivity and profitability! We've made some exciting changes to this year's agenda by adding 47 never-before-offered sessions. Other highlights include:

## Over 115 Unique Sessions

- **New!** Meet with Corptax!: driving the future
- **New!** Hands-on sessions where interaction meets imagination
- **New!** Hot topics: TCJA, International, and more
- **New!** Lunch Connections: meet peers with shared interests
- Client Experience & Case Study sessions
- Hands-on product training
- Tax Transformation Workshop
- Special events & networking functions

## Networking Events

Sunday, November 10

- Welcome Reception

Monday, November 11

- User Group Meetings
- Reception

Tuesday, November 12

- 2019 Corptax and Feed My Starving Children MobilePack Event
- Reception

Wednesday, November 13

- Conference Event

## Tax Transformation Workshop

- One-on-one consultations with Corptax experts
- Product demonstrations
- Sponsor networking contest entries
- Daily raffle drawings
- Networking lounge, giveaways, and refreshments

## Course Skill Levels

**Note:** CONNECT 2019 courses are identified by skill level. You can find the right match for your experience.

- 000 series = Overview
- 100 series = Basic
- 200 series = Intermediate
- 300 series = Advanced
- Sessions tagged with \* indicate that the session is a hands-on class. One computer to every two attendees with sample data to facilitate session examples. Pair up and use the opportunity to learn from your peers along the way.

## Administration & Security

A secure and productive environment is the goal of every administrator. This category guides Corptax administrators through the initial set up, the maintenance process, and common solutions for issues.

### Administration & Security Sessions

Session Name	Day and Time
AS-201* Setting Up Corptax for Success	Monday 10:15 a.m. - 12:00 p.m. Wednesday 8:00 a.m. - 9:45 a.m.
AS-202 Managing the Maintenance Lifecycle	Monday 3:45 p.m. - 5:30 p.m. Thursday 10:15 a.m. - 12:00 p.m.
AS-203* Corptax Administrators: Sharpen Your Troubleshooting Skills	Tuesday 8:00 a.m. - 9:45 a.m. Thursday 1:45 p.m. - 3:30 p.m.
AS-204 Control Access to Collateral with Confidence (NEW)	Wednesday 10:15 a.m. - 11:15 a.m.

### Related Session

Session Name	Day and Time
IC-204* Corptax International: Administration and Management	Tuesday 10:15 a.m. - 12:00 p.m.

## AS-201\* Setting Up Corptax for Success

Control access to your application and data with confidence. In this hands-on session, you'll explore Corptax security settings and policies to help you adhere to your security standards.

### Objectives:

- Understand methods of controlling access to Corptax products
- Examine security settings to control specific data and features
- Select options to ensure only authorized users have access
- Discover special Corptax Support offerings for Corptax Administrators

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**Day & Time:** Monday 10:15 a.m. - 12:00 p.m.  
Wednesday 8:00 a.m. - 9:45 a.m.

**Category:** Administration & Security

**Skill Level:** Intermediate

**Session ID:** AS-201\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## AS-202 Managing the Maintenance Lifecycle

Gain new insight to system administration. Using Corptax tools, this session walks you through the steps during each Maintenance Life Cycle phase to ensure your data is accurately reported and safeguarded.

### Objectives:

- Identify key elements in the maintenance life cycle
- Explore tools and processes for rolling over your system to the upcoming year
- Walk through steps for maintaining your system, collateral, and users throughout the year
- Select policies and tools to protect your system and data

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**Day & Time:** Monday 3:45 p.m. - 5:30 p.m.  
Thursday 10:15 a.m. - 12:00 p.m.

**Category:** Administration & Security

**Skill Level:** Intermediate

**Session ID:** AS-202

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## AS-203\* Corptax Administrators: Sharpen Your Troubleshooting Skills

Need a better process for troubleshooting issues within Corptax? This hands-on session directs you to the tools and resources designed to resolve issues and reduce interruptions. We'll also identify key information when submitting a support case for a quicker resolution.

### Objectives:

- Recognize key steps to troubleshoot and resolve issues
- Use Corptax tools to determine causes and locate solutions
- Prepare detailed support cases to expedite resolutions

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**Day & Time:** Tuesday 8:00 a.m. - 9:45 a.m.  
Thursday 1:45 p.m. - 3:30 p.m.

**Category:** Administration & Security

**Skill Level:** Intermediate

**Session ID:** AS-203\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## AS-204 Control Access to Collateral with Confidence (NEW)

As 'gatekeeper' for system updates and administration, the Corptax Administrator will be experiencing new levels of interaction with the team of users. More forms and reports are moving toward issuance as collateral therefore an increased awareness of availability and updates will be important to all team members. Join us to review the overall process along with recommendations for managing the collateral and security tips.

### Objectives:

- Overview of collateral including what it is, when and how to load
- Identify the collateral released and updates
- Examine the overall process and team awareness
- Review best practices for collateral loads and security

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**Day & Time:** Wednesday 10:15 a.m. - 11:15 a.m.

**Category:** Administration & Security

**Skill Level:** Intermediate

**Session ID:** AS-204

**Duration:** 1 Hour

**CPE Credit:** 1

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## Automation

Automation can streamline your processes by minimizing repetitive tasks. This category highlights many automation tools such as: automated adjustments, Corptax BOTS, and more.

### Automation Sessions

Session Name	Day and Time
AT-001 Process Automation: Peer Roundtable	Tuesday 8:00 a.m. - 9:00 a.m.
AT-002 Reduce Work Using Automation Tools	Tuesday 8:00 a.m. - 9:45 a.m. Wednesday 8:00 a.m. - 9:45 a.m.
AT-003 Tax Performance Engineering (NEW) <i>Presented by Platinum Sponsor: BDO</i>	Thursday 8:00 a.m. - 9:30 a.m.
AT-004 Corptax Automation (NEW) <i>Presented by Platinum Sponsor: Deloitte Tax LLP</i>	Monday 10:15 a.m. - 11:45 a.m.
AT-005 Tax Processes and Advanced Automation (NEW) <i>Presented by Platinum Sponsor: Deloitte Tax LLP</i>	Wednesday 1:30 p.m. - 2:30 p.m.
AT-006 Client Success Stories: Automation (NEW)	Wednesday 8:00 a.m. - 9:00 a.m.
AT-007 Client Success Stories: BOTS (NEW)	Tuesday 10:15 a.m. - 11:15 a.m.
AT-101 Exploring the Power of Corptax Web	Monday 1:30 p.m. - 3:15 p.m. Thursday 1:45 p.m. - 3:30 p.m.
AT-102* Reduce Tax Preparation Activities with Automated Adjustments	Tuesday 10:15 a.m. - 12:00 p.m.
AT-201* Move Faster with Automated Adjustments	Tuesday 1:30 p.m. - 3:15 p.m. Thursday 10:15 a.m. - 12:00 p.m.
AT-202 Prove It! Adopting Automation Tools for Adjustments (NEW)	Wednesday 3:45 p.m. - 4:45 p.m.
AT-203* Slash Process Time with Corptax BOTS!	Monday 10:15 a.m. - 11:45 a.m. Wednesday 1:30 p.m. - 3:00 p.m.
AT-204* TaxShark Tank: BOTS Your Way to Tax Utopia (NEW)	Wednesday 3:45 p.m. - 5:30 p.m.
AT-205 Try It, Apply It: Filing Cart Manager to Get Everything You Need (NEW)	Tuesday 8:00 a.m. - 9:45 a.m.
AT-206 Methods & Mastery for Tax Transformation: Single Solution (NEW)	Monday 10:15 a.m. - 12:00 p.m. Wednesday 10:15 a.m. - 12:00 p.m.



## AT-001 Process Automation: Peer Roundtable

Looking to further automate your processes using Corptax? Participate in a peer discussion to share and learn experiences with like minds.

### Objectives:

- Discuss tools that improve processes
- Consider and collaborate on methods

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## AT-002 Reduce Work Using Automation Tools

Explore how Corptax's data management, workflow process, and Corptax BOTS can save time and reduce workload.

### Objectives:

- Examine features and benefits of automation tools
- Consider best practices and ways to improve consistency to reduce your work

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:45 a.m. Wednesday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-002
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## AT-003 Tax Performance Engineering (NEW)

*Presented by Platinum Sponsor: BDO*

Meet BDO's Tax Performance Engineering team and discover what they can do for you. Our focus is tax process improvement: assisting tax departments with the development of a risk-based approach to global income tax reporting through process engineering and the maximizing the efficiency of these processes using technology. These improvements increase performance and reduce risk and also allows for more time to be devoted to analytics and review, versus data manipulation and maintenance of spreadsheets. More standardization, less risk.

Our projects involve a review of all aspects of the tax function: Process, Data, Software & Workforce. Our tax technical knowledge and broad experience solving tax process challenges, coupled with his knowledge of the various technologies, has led to highly successful results. We have experience with all major tax technology vendor.

With a network spanning more than 150 countries worldwide, BDO is the 5th largest global network of public accounting firms. Our seamless global approach allows us to serve clients through a central point of contact, granting access to relevant experience across borders.

### Objectives:

- Understand a risk-based approach to global income tax reporting
- Evaluate your current tax processes with the goals of:
  - Identifying opportunities within your organization to maximize efficiency through the use of technology
  - Reducing the amount of time spent manipulating data and maintaining spreadsheets
  - Devoting more time to data analytics and review
- Differentiate between types of tax technology solutions
- Apply tax technology solutions to increase standardization and reduce risk

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 9:30 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-003
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Scott Hice, BDO Jonathan Spiegel, BDO

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## AT-004 Corptax Automation (NEW)

Presented by Platinum Sponsor: Deloitte Tax LLP

Join members of the CVS tax department as they discuss:

1. How they have automated key tax processes using Corptax.
2. How they have integrated Corptax with other tools used by the tax department.
3. How they have integrated two tax departments into one instance of Corptax for compliance purposes and how they have automated their provision process.
4. How they have maximized their usage of Corptax.

### Objectives:

- Understand how to use Corptax to automate key tax processes
- Understand how Corptax can be integrated with other tools used by the tax department
- Understand the process used to integrate two instances of Corptax into one
- Identify ways to maximize the usage of Corptax

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 11:45 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-004
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Aaron Bairani, Deloitte Michael Chen, CVS Health Paul Isabella, CVS Health Ying Tan, CVS Health Donald Welch, CVS Health

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## AT-005 Tax Processes and Advanced Automation (NEW)

Presented by Platinum Sponsor: Deloitte Tax LLP

Are you spending time performing manual and repetitive tasks? Do you wonder if there are parts of your tax process that could be more efficient? Have you wanted to take your automation to the next level? Please join members of Deloitte's Tax Management Consulting (TMC) practice as they discuss tax processes that are leading candidates for advanced automation, the options that can be utilized to create the automation, and how to tackle implementing advanced automation.

### Objectives:

- Understand how to identify and prioritize which tax processes are good candidates for advanced automation
- Know which technology tools can be used to create advanced automation
- Understand how to implement advanced automation

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<b>Day &amp; Time:</b>	Wednesday 1:30 p.m. - 2:30 p.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-005
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Cristin Boynton, Deloitte Tax LLP Jessica Ottlinger, Deloitte Tax LLP

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## AT-006 Client Success Stories: Automation (NEW)

Join this interactive session to hear how your peers have reduced processing time by increasing automation.

### Adria Gonzales - Anadarko

Tax Automation & Analytics concepts and application for corporate direct tax processing

### Rachel Quade - Artisan Partners LP

Taking the import of trial balance data to a new level of automation and saving hours in the process

### Evan White - USAA

Finding automation through implementation: ODBC and data exchange

#### Objective:

- Identify methods used by your peers for automation that you can leverage

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<b>Day &amp; Time:</b>	Wednesday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-006
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## AT-007 Client Success Stories: BOTS (NEW)

Want to know how Corptax BOTS can save you time? Then, you won't want to miss hearing exactly how your peers have accomplished automation through implementing Corptax BOTS.

### Lily Shui - ConocoPhillips

Use Data Exchange and Corptax BOTS to automate the adjustment process and get notifications of status along the way.

### Othman Riad - Fortive

One minute of work for the robot is equal to approximately 15 minutes of work of a person. Bots can help tax departments become more efficient and are simplifying the routine processes and enabling tax professionals to focus on being a strategic advisor to the business.

#### Objective:

- Identify methods used by peers to gain efficiencies that you can use at your office

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<b>Day &amp; Time:</b>	Tuesday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	AT-007
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## AT-101 Exploring the Power of Corptax Web

Are you taking advantage of Corptax Web's improved features and functionality? Join this session to navigate Corptax Web and discover what you've been missing!

### Objectives:

- Discover how to navigate Corptax Web
- Determine the power of Cart
- Examine tax returns and enhanced reporting capabilities
- Analyze your data with more power queries
- Use widgets to maximize your view

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 3:15 p.m. Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	AT-101
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## AT-102\* Reduce Tax Preparation Activities with Automated Adjustments

Still entering manual adjustments into Corptax? Tired of inconsistent adjustment backup workpapers? See how Corptax Automated Adjustments reduces workload and improves reporting. Join this hands-on session to apply your new knowledge on creating automated adjustments as well as posting and reviewing the results.

### Objectives:

- Discover the benefits of automating your adjustments
- Take part in steps to create and process an automated adjustment
- Compare workpaper models to determine which one to use for your adjustment
- Run workpapers and post the results for review

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<b>Day &amp; Time:</b>	Tuesday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	AT-102*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## AT-201\* Move Faster with Automated Adjustments

Want to optimize the workflows around how you enter adjustments into Corptax? Are you ready to use the latest functionality in Corptax Web to help with the process? Join this hands-on session to see how you can take advantage of not just manual entry, but importing data for your adjustments, using batches and Cart as well as Workflow and Corptax BOTS to take away a lot of manual effort.

### Objectives:

- Assess which adjustments are excellent candidates for automation
- Examine Corptax security rights to indicate which users can accomplish which tasks
- Find out how importing data into adjustments has been enhanced
- Consider the benefits of using batches and the Cart in your adjustment processes
- Identify methods to increase efficiency

<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 3:15 p.m. Thursday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	AT-201*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## AT-202 Prove It! Adopting Automation Tools for Adjustments (NEW)

Jump start your adoption of Corptax automation tools to streamline adjustments. Based on the popular TV show 'MythBusters', we'll debunk common myths around Automated Adjustments to Prove It! to you how applying automation into your existing processes saves valuable time.

### Objectives:

- Outline the challenges holding you back
- Breakdown those challenges into manageable tasks
- Review the ways that data can be isolated in Corptax via a number of automation tools
- Provide a work plan for you to begin using these timing saving workpapers in your office

<b>Day &amp; Time:</b>	Wednesday 3:45 p.m. - 4:45 p.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	AT-202
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## AT-203\* Slash Process Time with Corptax BOTS!

Do you come in early or stay late to kick off certain Corptax processes or reports? Are there procedures that require manual intervention that you wish were more efficient? Sign up for this hands-on session to discover how Corptax BOTS can automate many of these steps which gives you time to analyze results instead of creating them!

### Objectives:

- Discover what Corptax BOTS is and how to use it
- Recognize steps to set up a bot
- Modify an existing bot and create a new one
- Listen to examples of how Corptax BOTS is helping your peers become more efficient

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**Day & Time:** Monday 10:15 a.m. - 11:45 a.m.  
Wednesday 1:30 p.m. - 3:00 p.m.

**Category:** Automation

**Skill Level:** Intermediate

**Session ID:** AT-203\*

**Duration:** 1 Hour 30 Minutes

**CPE Credit:** 1.5

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## AT-204\* TaxShark Tank: BOTS Your Way to Tax Utopia (NEW)

Dream It, Pitch It! Based on the popular TV show, this interactive series teaches you how to uncover and quickly explain trends, data anomalies and outlier outcomes for all levels of reporting. Collaborate with a peer team, then get judged by a 'Corptax pro' panel who recognize and elevate the best ideas - everyone learns! You'll learn how to build an import package that eliminates manual organization of data, automates adjustments to hack process time, runs reports at various levels, moves data confidently with advanced queries, and automates your international calculation.

### Objectives:

- Eliminate manual steps throughout provision and return preparation to streamline and reduce risk through reporting.
- Expedite a provision close and give your compliance team data needed to start report prep instantly with advance query and rules management.

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**Day & Time:** Wednesday 3:45 p.m. - 5:30 p.m.

**Category:** Automation

**Skill Level:** Intermediate

**Session ID:** AT-204\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## AT-205 Try It, Apply It: Filling Cart Manager to Get Everything You Need (NEW)

Nothing moves like a Cart! Take Cart Manager for a spin to get the most out of source data, squash automation barriers, and expand reporting capabilities. You'll return to the office inspired and ready to emulate advanced queries, automated adjustments and tricks for grouping data from this interactive class.

### Objectives:

- Explore all the processes that can be combined into one cart for faster results.
- Learn how to bundle tax returns, workpapers, and reports using one cart for a complete audit package.
- Reuse the same cart over and over month after month year after year.

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	AT-205
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## AT-206 Methods & Mastery for Tax Transformation: Single Solution (NEW)

Take a deeper dive into provision and compliance and enjoy the bump in the tax department's status when you apply your expanded understanding of a single database. Beyond reporting, you'll explore ways to reveal anomalies, compare multiple scenarios, and deliver analytics to be used from the tax analyst through to your C-Suite from a single system.

### Objectives:

- See how a single system gets you to the finish line faster with data used across all tax reporting.
- Understand how data is reused for analysis during provision and compliance.
- Learn how direct access to data can upload your analytics including C-Suite schedules.

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 12:00 p.m. Wednesday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Automation
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	AT-206
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## Client Success Stories

Look to your peers and industry experts to learn ways to maximize your software investment and work more efficiently. The Client Success Stories category offers idea sharing through discussions, client experiences, and tips and tricks that you can use as soon as you return to the office.

### Client Success Stories Sessions

Session Name	Day and Time
SS-020 Achieving Financial Controls in Fixed Asset Management (NEW) <i>Presented by Platinum Sponsor: Bloomberg BNA</i>	Tuesday 8:00 a.m. - 9:00 a.m.
SS-021 Tax Process Improvement at Toyota (NEW) <i>Presented by Platinum Sponsor: KPMG, LLP</i>	Thursday 8:00 a.m. - 9:00 a.m.
SS-023 Manage Legal Entity Reporting Changes & Update Corptax for ERP Implementations (NEW) <i>Presented by Gold Sponsor: Grant Thornton</i>	Monday 1:30 p.m. - 2:30 p.m.
SS-024 Implementing Corptax Compliance Concurrently with Other Systems (NEW) <i>Presented by Gold Sponsor: Grant Thornton</i>	Tuesday 1:30 p.m. - 2:30 p.m.

### Related Sessions

Session Name	Day and Time
AT-004 Corptax Automation (NEW)	Monday 10:15 a.m. - 11:45 a.m.
AT-006 Client Success Stories: Automation (NEW)	Wednesday 8:00 a.m. - 9:00 a.m.
AT-007 Client Success Stories: BOTS (NEW)	Tuesday 10:15 a.m. - 11:15 a.m.
CSP-209* The Power of State Planner and Your Data in a Single Solution	Thursday 8:00 a.m. - 12:00 p.m.
DM-001 Client Success Stories: Corptax Office, POV, Power Pivot and Power Query (NEW)	Wednesday 10:15 a.m. - 11:15 a.m.
EM-001 Client Success Stories: Entity Management (NEW)	Wednesday 3:45 p.m. - 4:45 p.m.
IN-002 Corptax in the Insurance Industry (NEW)	Monday 3:45 p.m. - 5:15 p.m.
PR-003 Corptax Provision – Enhancing our Implementation (NEW)	Monday 1:30 p.m. - 3:00 p.m.
PR-006 Client Success Stories: Provision (NEW)	Tuesday 8:00 a.m. - 9:00 a.m.

## SS-020 Achieving Financial Controls in Fixed Asset Management (NEW)

Presented by Platinum Sponsor: Bloomberg BNA

Fixed Assets often represent the single largest balance sheet item on company's financial statements, and the sheer volume of data involved in managing them creates massive risk. However, with the right practices and procedures in place, fixed assets can represent one of the best tax optimization opportunities around. Through planning for cost segregation studies, optimizing the use of bonus depreciation, and differences in state tax depreciation rules, tax professionals can turn fixed assets from a tracking nightmare into a prime planning opportunity. Join Sr. Product Manager Ryan Sheehan of Bloomberg Tax & Accounting to learn how.

### Objectives:

- Best practices for maintaining control over fixed assets
- How to manage the risk-benefit of cost-segregation studies
- How to creatively tackle the challenges of state tax depreciation calculations
- How to cope with tax law changes

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Client Success Stories
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	SS-020
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speaker:</b>	Ryan Sheehan, Sr. Product Manager, Bloomberg Tax & Accounting

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## SS-021 Tax Process Improvement at Toyota (NEW)

Presented by Platinum Sponsor: KPMG, LLP

The TFS team was working 20 hour days over a 9 day close, with their processes being time consuming and redundant. The source workpapers were not standardized, automated, or integrated with their systems. Learn how Toyota Financial Services improved their state process through automation, standardization, workpaper and security improvements.

### Objectives:

- Reduce time spent on calculations by identifying and reducing redundant process steps
- Standardize, automate, integrate and secure source workpapers
- Standardize the use and calculation of state data
- Deployed an NOL tracking tool to secure historical data and automatically analyze available NOL's

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Client Success Stories
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	SS-021
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Wendell Ford, KPMG LLP Chris Zibert, KPMG LLP Rachel Howard, Toyota

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## SS-023 Manage Legal Entity Reporting Changes & Update Corptax for ERP Implementations (NEW)

*Presented by Gold Sponsor: Grant Thornton*

Are you reporting at a different legal entity level than the finance function or rest of the organization? Do you spend an inordinate amount of time trying to reconcile between different reporting levels? Are you going through an ERP implementation? Please join members of the Kemper Tax Department and the Grant Thornton Tax Innovation group as they discuss how to best handle these transformations using Corptax.

### Objectives:

- Utilize Corptax to segregate data, track changes, and preserve as-filed reporting
- Standardize, integrate, and secure source workpapers
- Memorialize the future state through documentation
- Identify and prioritize future process improvement opportunities

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 2:30 p.m.
<b>Category:</b>	Client Success Stories
<b>Session Level:</b>	Overview
<b>Session ID:</b>	SS-023
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Session Type:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Adam Duale, Grant Thornton Ania Wojtowicz, Grant Thornton Ruby Bui, Kemper Corporation

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## SS-024 Implementing Corptax Compliance Concurrently with Other Systems (NEW)

*Presented by Gold Sponsor: Grant Thornton*

You have decided to bring the Tax Return and Provision preparation in-house but must use different software solutions, how do you create a Tax Life-Cycle process? What are the Inputs/Outputs and Interactions to consider? Please join members of the Hasbro Tax Department and the Grant Thornton Tax Innovation group as they discuss how to best handle these transformations.

### Objectives:

- Design a Tax Life-Cycle that is software agnostic
- Standardize and rationalize profiles
- Leverage historical workpapers
- Identify and prioritize future process improvement opportunities

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<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 2:30 p.m.
<b>Category:</b>	Client Success Stories
<b>Session Level:</b>	Overview
<b>Session ID:</b>	SS-024
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Session Type:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	James Bella, Grant Thornton Kathy Bertone, Hasbro Corporation Casey Cullen, Hasbro Corporation

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## Compliance

Compliance comes in many forms. This category covers the bases from Federal to Pass Through to e-File and more. Join us to experience basic through intermediate training on many of the compliance processes.

### Compliance Sessions

Session Name	Day and Time
CA-101 Corptax Users Solve Mystery thru Collaboration	Wednesday 1:30 p.m. - 3:15 p.m.
CA-201 Optimize Your Use of the Tax Return Window (NEW)	Tuesday 1:30 p.m. - 2:30 p.m.
CB-202* Minicamp: Automate BEPS Reporting with Corptax	Thursday 8:00 a.m. - 12:00 p.m.
CC-203* Manage Your Tax Obligations with Corptax Calendar	Wednesday 1:30 p.m. - 5:30 p.m.
CEF-204* A Practical Approach to e-Filing Domestic Returns	Wednesday 8:00 a.m. - 12:00 p.m.
CEF-205* A Practical Approach to e-Filing State Returns	Thursday 10:15 a.m. - 12:00 p.m.
CEF-206* A Practical Approach to e-Filing with Mixed Returns	Thursday 8:00 a.m. - 9:45 a.m.
CEF-207* Proven Methods for Resolving e-File Errors	Tuesday 1:30 p.m. - 3:15 p.m. Thursday 1:45 p.m. - 3:30 p.m.
CPT-001 Pass Through Overview: Everything You Need to Know	Monday 3:45 p.m. - 4:45 p.m.
CPT-102* Explore Your Use of Partnership and S Corporation Compliance	Wednesday 8:00 a.m. - 5:30 p.m.
CPT-208* Maximize Your Use of Pass Through	Thursday 8:00 a.m. - 12:00 p.m.
CSP-209* The Power of State Planner and Your Data in a Single Solution	Thursday 8:00 a.m. - 12:00 p.m.
CUS-003 U.S. Compliance & e-File: Peer Roundtable (NEW)	Thursday 8:00 a.m. - 9:00 a.m.
CUS-103* Master Corptax Fundamentals for U.S. Compliance	Monday 10:15 a.m. - 12:00 p.m.
CUS-104* Know Federal U.S. Compliance Basics Like the Back of Your Hand	Monday 1:30 p.m. - 5:30 p.m.
CUS-105* Preparing State Income Tax Returns, from Single to Consolidated	Tuesday 8:00 a.m. - 12:00 p.m.
CUS-106 How to Be One, Big Happy Family: Improve Interaction between Federal & State Users (NEW)	Tuesday 1:30 p.m. - 2:30 p.m.
CUS-210* U.S. Compliance - Federal: Intermediate Filing Concepts	Wednesday 1:30 p.m. - 5:30 p.m.
CUS-211* U.S. Compliance - State: Intermediate Filing Concepts	Wednesday 8:00 a.m. - 12:00 p.m.
CUS-212 Beyond the Basics State Return Prep	Wednesday 3:45 p.m. - 5:30 p.m.
CUS-213* Harness the Power of Corptax for Amended Federal Return Preparation	Thursday 1:45 p.m. - 3:30 p.m.
CUS-214* Automate Your Way through Amended State Return Preparation	Thursday 1:45 p.m. - 3:30 p.m.

### Related Sessions

Session Name	Day and Time
GS-004 Product Update: What's on the Horizon for Corptax	Monday 1:30 p.m. - 3:15 p.m. Wednesday 1:30 p.m. - 3:15 p.m.
IC-301* Prepare Form 8865 Using Pass Through with Corptax International	Tuesday 8:00 a.m. - 12:00 p.m.

## CA-101 Corptax Users Solve Mystery thru Collaboration

Be the first to solve a mystery set in San Diego, using your Corptax knowledge while navigating the local streets on a large-scale game board racing to beat the opposing teams. Randomly team-up to correctly answer Corptax multiple-choice questions allowing you to advance to iconic destinations inside the beltway while networking with your fellow industry peers to acquire and decipher clues in an adventure unlike any other. Organize your team to effectively use its resources and skills to unravel a shrouded (crime) mystery. Knowledge, collaboration, networking, teamwork, and problem solving are all a part of this adapted mystery game.

*Note:* Each team will need at least one smart phone with the Kahoot app to participate in the session.

### Objectives:

- Apply and reinforce your Corptax Federal, State, International, e-File, Pass-through and Corptax Office skills
- Collaborate with other Corptax users
- Use the game board, venue, and team to solve a fictional mystery
- Organize and work with your team to maximize points scored by finding and answering clues

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<b>Day &amp; Time:</b>	Wednesday 1:30 p.m. - 3:15 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	CA-101
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## CA-201 Optimize Your Use of the Tax Return Window (NEW)

Join us to share best practices for navigating and optimizing your use of the revised Tax Returns window. Understand the benefits of the updates and how changes to the process can drive long term streamlined use of the tool. Next, the session will turn to interactive sharing of your team's use and needs for return processing which will lead to brainstorming on future features.

### Objectives:

- Obtain best practices for Tax Return Window
- Share current processes to have impact on future development

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<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 2:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CA-201
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## CB-202\* Minicamp: Automate BEPS Reporting with Corptax

Interested in a comprehensive solution to meet your County-by-Country (CbC) reporting requirements? Join this hands-on session to see how you can leverage data already in Corptax such as amounts, entity information, and other setup items to simplify and streamline global compliance. Walk through the process from setup to reporting and analysis. See how you can use the power of Corptax to make your BEPS process easier and more automated.

### Objectives:

- Determine how Corptax BEPS CbC helps automate and streamline your BEPS reporting requirements
- Examine the required setup for the BEPS process in Corptax
- Inspect the reports that are available in the system
- Interpret how to prepare Form 8975 for reporting in the U.S.
- Find out how to send reports to other countries where you have a reporting requirement

<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CB-202*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## CC-203\* Manage Your Tax Obligations with Corptax Calendar

Managing your tax obligation is daunting without Corptax Calendar! Learn how to track your organization's obligations for tax and non-tax purposes, including non-U.S. jurisdictions, Sales, VAT, and Unclaimed Property. This hands-on session teaches you to track and maintain multiple obligations, including tasks, due dates, payments, user defined activities, and refunds.

### Objectives:

- Examine calendar profiles which maintain the deliverable information
- Create calendar properties
- Build calendars using both the Execute Rules and Create Calendar methods
- Import payments
- Create certified mailing labels
- Generate email notifications

<b>Day &amp; Time:</b>	Wednesday 1:30 p.m. - 5:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CC-203*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## CEF-204\* A Practical Approach to e-Filing Domestic Returns

No matter which type of return you file, 1120, 1118, or 5471, most likely, you are filing it electronically. Join this hands-on session to discover the basic steps for setting up your e-file process, including creating entity structure reports, MeFs, filing groups, attaching supporting documents, and more!

### Objectives:

- Examine key items to review on the federal return
- Locate e-File resources and tools
- Identify the appropriate choice for setting up entity structure reports
- Create the needed MeF files
- Load the domestic and foreign files into Corptax e-File
- Validate entities and check for errors
- Attach supporting documents into the e-File package
- Clear basic errors
- Discuss methods for sending the e-File package to the IRS
- Examine the contents of the e-File package

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**Day & Time:** Wednesday 8:00 a.m. - 12:00 p.m.

**Category:** Compliance

**Skill Level:** Intermediate

**Session ID:** CEF-204\*

**Duration:** 3 Hours 30 Minutes

**CPE Credit:** 4

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## CEF-205\* A Practical Approach to e-Filing State Returns

So many states, so many rules! e-Filing your state return can be a daunting task. Take part in the basic steps to complete the federal proforma and state e-file processes in this hands-on session. Distinguish the common features across multiple states, as well as unique considerations for specific states.

### Objectives:

- Create a federal 1120 proforma e-File package
- Identify the e-File resources and tools
- Complete the state e-File process for a single and consolidated entity
- Examine the state e-File package contents
- Download the state return package

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**Day & Time:** Thursday 10:15 a.m. - 12:00 p.m.

**Category:** Compliance

**Skill Level:** Intermediate

**Session ID:** CEF-205\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## CEF-206\* A Practical Approach to e-Filing with Mixed Returns

Looking how to combine Form 1120 with Form 1120 -L, Life and/or Form 1120-PC, Property Casualty returns for e-filing? In this hands-on session, examine the details of mixed group returns including groups and options required to successfully e-file.

### Objectives:

- Determine entity group requirements that represent the different consolidations within a mixed group return
- Recognize the concept and function of the entity structure report
- Examine the top consolidation and subconsolidation returns
- Enter options and post amounts
- Generate MeF Files for each consolidation level
- Create and view the e-File package
- Solve basic errors

<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CEF-206*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-210* or similar experience
<b>Advanced Prep:</b>	None

## CEF-207\* Proven Methods for Resolving e-File Errors

Don't let changing e-file requirements result in errors on your return. In this hands-on session, consider methods for identifying and resolving these errors.

### Objectives:

- Locate Corptax resources to use during your e-file process
- Organize filing groups to simplify correcting errors
- Deconstruct error messages to quickly identify the source of the error
- Discover best practice methods

<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 3:15 p.m. Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CEF-207*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-210* or similar experience
<b>Advanced Prep:</b>	None



## CPT-001 Pass Through Overview: Everything You Need to Know

If you handle compliance for Partnerships, LLCs and S-Corps, this session is for you! Get a deeper understanding of how to post multiple tiered entities; treat and allocate flow-through apportionment factors; compute effective ratios on transfers of ownership; and manage K-1 footnotes, special allocations, and rental real estate compliance.

### Objectives:

- Examine efficiencies with footnotes
- Find out how to query pass through allocation data
- Discover how to establish tiered partnership interest between owners
- Determine how to integrate outside K-1 data into Corptax partnerships

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 4:45 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	CPT-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## CPT-102\* Explore Your Use of Partnership and S Corporation Compliance

In this hands-on session, simplify your partnership and S Corporation compliance by examining the setup of pass through entities, populating Schedule K-1s using the allocation engine, and exploring the special allocation methods.

### Objectives:

- Discover how to set up partnership entities
- Create and associate partners and shareholders in a partnership
- Carry out the steps of importing Schedule K-1 data
- Take part in entering special allocations
- Examine how to manage changes in ownership
- Prepare partnership and S Corporation returns

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<b>Day &amp; Time:</b>	Wednesday 8:00 a.m. - 5:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	CPT-102*
<b>Duration:</b>	7 Hours
<b>CPE Credit:</b>	8
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## CPT-208\* Maximize Your Use of Pass Through

In this hands-on session, efficiently use the Pass Through module by creating, attaching, importing, and exporting footnotes across pass through entities. See how tiering reduces preparation and reconciliation time by pushing the pass through income up the organizational chain automatically and use best practices for return preparation.

### Objectives:

- Create, import, and export footnote templates
- Find out how to import data to existing footnote accounts
- Take part in referencing existing return data to a footnote
- Examine tiering setup and data flow
- Discover efficiencies in state return and composite processing
- Use system tools to report different methods of capital on K-1s
- Consider time-saving best practices, tips and tricks

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CPT-208*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CPT-102* or similar experience
<b>Advanced Prep:</b>	None

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## CSP-209\* The Power of State Planner and Your Data in a Single Solution

Use the power of Corptax's single database to calculate state estimated tax payments. Join this hands-on session to produce separate company as well as combined and consolidated estimate calculations. Examine how to pull data from compliance and provision and post results for use in state vouchers and integration with Corptax Calendar.

### Neha Manglik, Chevron

By using the data in the system, State Planner made our work a lot easier. It minimizes the risk of inconsistency, mathematical errors and streamlines an overall a very time-consuming activity.

### Objectives:

- Examine profile setup requirements
- Select apportionment method and options
- Produce State Planners reports and forms for review
- Integrate with Corptax Calendar
- Prepare a state voucher
- Identify methods used by peers to gain efficiencies that you can use at your office

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CSP-209*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## CUS-003 U.S. Compliance & e-File: Peer Roundtable (NEW)

Join this session to learn best practices for the U.S. Compliance process. Engage in a discussion on the use of Corptax and overcome the federal and state compliance challenges to achieve a successful tax return filing. Discover tips and tricks used by other clients and the Corptax pros that improve and streamline your compliance processes with innovative techniques.

### Objectives:

- Collect new best practices to incorporate into your compliance process
- Consider tips and tricks to enhance your compliance practices

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	CUS-003
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## CUS-103\* Master Corptax Fundamentals for U.S. Compliance

New to Corptax? Attend this hands-on session to learn how to use key interface items such as ribbons, grids, and dashboards. Take part in the setting up of the system to take advantage of the Corptax common user experience, common database, and common administration.

### Objectives:

- Examine and navigate the Corptax interface
- Construct the Corptax profiles to best fit your organization's needs

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	CUS-103*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## CUS-104\* Know Federal U.S. Compliance Basics Like the Back of Your Hand

If you are preparing a Federal separate or consolidated return, this hands-on session is for you! Walk through the process of preparing a federal return starting with entering trial balance data and manual adjustments, then running reports, and finally completing the return.

### Objectives:

- Identify and post book and tax adjustments
- Examine federal reports
- Review tax return instructions and other resources
- Create a separate and a consolidated Federal 1120 Income Tax Return

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 5:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	CUS-104*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## CUS-105\* Preparing State Income Tax Returns, from Single to Consolidated

Learn the basics of state income return prep from single states to combined/consolidated in this hands-on session. Watch the steps of retrieving state data into Excel using data management tools.

### Objectives:

- Determine how to enter and review apportionment data from the Enter Amounts window
- Recognize how data flows into Returns and Reports
- Create a new state return
- Examine state returns and reports
- Modify and review apportionment data within the return
- Carry out the post process
- Use Corptax Office to retrieve state data

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	CUS-105*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## CUS-106 How to Be One, Big Happy Family: Improve Interaction between Federal & State Users (NEW)

Your Federal and state tax return preparers are great but so are the obstacles they must overcome. With conflicting deadlines, critical return data hand-offs, changing data, TCJA, departures from federal provision in state law and other compliance adversities, the department can become a dysfunctional family of sorts. Attend this session to see Corptax interactions and workflow that will bring your processes into a more perfect union.

### Objectives:

- Review the Corptax transition from Federal return data to individual state return data
- Review the Federal and state data dependencies
- Review “best practices” to insure accurate and timely filings
- Review “best practices” for timely interactions and effective thoughtful communications between departments
- Review the Corptax TCJA State Matrix which summarizes TCJA differences between Federal and state compliance

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**Day & Time:** Tuesday 1:30 p.m. - 2:30 p.m.

**Category:** Compliance

**Skill Level:** Basic

**Session ID:** CUS-106

**Duration:** 1 Hour

**CPE Credit:** 1

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** None

**Advanced Prep:** None

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## CUS-210\* U.S. Compliance - Federal: Intermediate Filing Concepts

Need to complete more of the federal return? Join this hands-on session to explore additional forms like Form 851, Form 3800, Federal Diagnostics, and much more!

### Objectives:

- Examine the Federal Diagnostics form
- Review additional information forms that need to be filed
- Recognize the advantages of the virtual Net Income per Books account functionality
- Determine the impact of setting calculation options
- Discover the power of posting calculated values back to the Corptax database

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**Day & Time:** Wednesday 1:30 p.m. - 5:30 p.m.

**Category:** Compliance

**Skill Level:** Intermediate

**Session ID:** CUS-210\*

**Duration:** 3 Hours 30 Minutes

**CPE Credit:** 4

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## CUS-211\* U.S. Compliance - State: Intermediate Filing Concepts

State tax returns are more than just federal taxable and state apportionment factors. Join this hands-on session to explore how Corptax state income tax returns are set up, review non-standard apportionment accounts, discover how to use intercompany accounts and throwback sales accounts, and the benefits of posting back your calculated values to generate post-filing analytics reports.

### Objectives:

- Conclude how Corptax state tax returns are set up uniformly
- Locate and read Corptax tax return instructions, Corptax Help, and Corptax Connect to answer your questions before they're asked
- Enter state modifications to impact your filing results
- Review additional reports to assist in your analysis as well as plan for future filings

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**Day & Time:** Wednesday 8:00 a.m. - 12:00 p.m.

**Category:** Compliance

**Skill Level:** Intermediate

**Session ID:** CUS-211\*

**Duration:** 3 Hours 30 Minutes

**CPE Credit:** 4

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-105\* or similar experience

**Advanced Prep:** None

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## CUS-212 Beyond the Basics State Return Prep

Want to go beyond the basics of state return prep? Learn how to handle complex state requirements such as MA simple vs complex, e-file considerations, state tax add backs, city returns, and more!

### Objectives:

- Examine the unique concepts of the CA state return
- Contrast multiple processing scenarios for Massachusetts combined returns
- Identify the steps to populate schedules CIR and FE for Massachusetts
- Examine the new MS filing requirements
- Listen to other state complex issues

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**Day & Time:** Wednesday 3:45 p.m. - 5:30 p.m.

**Category:** Compliance

**Skill Level:** Intermediate

**Session ID:** CUS-212

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-105\* or similar experience

**Advanced Prep:** None

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## CUS-213\* Harness the Power of Corptax for Amended Federal Return Preparation

Consider ways to use Corptax for analyzing and comparing various settlement position scenarios when preparing and e-filing your amended federal returns in this hands-on session.

### Objectives:

- Review as-filed returns for accuracy and post amounts
- Create a revised return and post amounts
- Prepare amended forms for filing
- Examine e-File considerations
- Compare settlement scenarios

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<b>Day &amp; Time:</b>	Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CUS-213*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## CUS-214\* Automate Your Way through Amended State Return Preparation

Discover how to use the data already in Corptax to streamline and automate your amended state return filing process in this hands-on session.

### Objectives:

- Review as-filed returns for accuracy
- Create a revised return and post amounts
- Prepare amended forms for filing
- Examine e-file considerations

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<b>Day &amp; Time:</b>	Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Compliance
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	CUS-214*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-105* or similar experience
<b>Advanced Prep:</b>	None

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## Data Management

Having a hard time managing data in the tax process? Corptax can help. Examine ways Corptax can transform and organize mountains of data using tools like Corptax Office, PowerPivot, Power Query, POV and Data Exchange.

### Data Management Sessions

Session Name	Day and Time
DM-001 Client Success Stories: Corptax Office, POV, Power Pivot and Power Query (NEW)	Wednesday 10:15 a.m. - 11:15 a.m.
DM-002 Corptax Office: Peer Roundtable (NEW)	Tuesday 10:15 a.m. - 11:15 a.m.
DM-003 Data Management: Peer Roundtable (NEW)	Wednesday 10:15 a.m. - 11:15 a.m.
DM-004 Using Corptax Office with Data Manipulation and Analytics Tools (NEW) <i>Presented by Platinum Sponsor: EY LLP</i>	Tuesday 1:30 p.m. - 2:30 p.m.
DM-101* Corptax Data Import From A - Z	Tuesday 1:30 p.m. - 3:15 p.m. Wednesday 8:00 a.m. - 9:45 a.m.
DM-102* Working in Harmony: Corptax Office and Excel	Monday 10:15 a.m. - 12:00 p.m. Wednesday 10:15 a.m. - 12:00 p.m.
DM-103* Real-time Data Connection: Corptax Office POV and Corptax ODBC Driver	Monday 3:45 p.m. - 5:30 p.m. Thursday 8:00 a.m. - 9:45 a.m.
DM-201* Conquering Importing and Exporting Data	Tuesday 8:00 a.m. - 12:00 p.m. Thursday 8:00 a.m. - 12:00 p.m.
DM-202* Minicamp: Corptax Office	Monday 1:30 p.m. - 5:30 p.m. Wednesday 1:30 p.m. - 5:30 p.m.
DM-203* Leverage Corptax Office for Your Provision Data	Wednesday 1:30 p.m. - 3:15 p.m.
DM-204* Leverage Corptax Office for Your International Data	Thursday 1:45 p.m. - 3:30 p.m.
DM-205* Query Your Way to Better Data Management	Tuesday 8:00 a.m. - 9:45 a.m. Thursday 1:45 p.m. - 3:30 p.m.
DM-206 Methods & Mastery for Tax Transformation: Data Dependency (NEW)	Monday 1:30 p.m. - 3:15 p.m. Wednesday 3:45 p.m. - 5:30 p.m.

### Related Session

Session Name	Day and Time
CUS-105* Preparing State Income Tax Returns, from Single to Consolidated	Tuesday 8:00 a.m. - 12:00 p.m.



## DM-001 Client Success Stories: Corptax Office, POV, Power Pivot and Power Query (NEW)

Want to know how your peers are automating their process using Corptax? Then this session is a must have for your schedule.

### Jennifer Neuberger - Alcoa Corp.

From zero to sixty, how the 'biggest fan' can become a Corptax Office expert and you can too!

### Kim Brundrit - Eastman Chemical Company

Using Corptax Office and POV to complete the return to provision process and more.

#### Objectives:

- Observe the impact these data management tools can have on your organization
- Identify time saving tools and methods that you can implement in your processes

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<b>Day &amp; Time:</b>	Wednesday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	DM-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## DM-002 Corptax Office: Peer Roundtable (NEW)

Hear how other Corptax Office fans are using it to make their processes more efficient and overcoming their challenges in this highly interactive session.

#### Objectives:

- Leverage the experience of your peers
- Identify tools you can implement to improve your processes using Corptax Office

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<b>Day &amp; Time:</b>	Tuesday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	DM-002
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## DM-003 Data Management: Peer Roundtable (NEW)

Join this interactive session and hear first hand what may be a data management challenge for one has been turned into SUCCESS for another.

### Objectives:

- Share data management success stories
- Identify methods for clearing hurdles by brainstorming with your peers

<b>Day &amp; Time:</b>	Wednesday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	DM-003
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## DM-004 Using Corptax Office with Data Manipulation and Analytics Tools (NEW)

*Presented by Platinum Sponsor: EY LLP*

Trying to make the most of your data? Learn how to use Corptax Office in conjunction with data manipulation tools such as Microsoft Power Query and analytics/visualization tools like PowerBI. We will showcase to how to collect, clean, and prepare your data for effective usage for provision and compliance processes, as well as end-user visualizations for effective and efficient review.

### Objectives:

- Best practices for Corptax Office
- Explore various data export options
- Learn about data manipulation and visualization tools

<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 2:30 p.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	DM-004
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## DM-101\* Corptax Data Import From A - Z

Get your arms around importing data into Corptax with this hands-on experience. This session explains the components and steps of the import process, including details of lookup tables, package, connectors, and duplicate amount options. You will import, review, and troubleshoot data from several sources. The session also explores the new Corptax Web functionality and uses Excel format to import data.

### Objectives:

- Create and modify packages, connectors, and lookups used in the import process
- Review and perform the import process for both trial balance and apportionment data
- Consider solutions to troubleshoot data and steps to navigate difficult uploads
- Process the import in Corptax Web

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**Day & Time:** Tuesday 1:30 p.m. - 3:15 p.m.  
Wednesday 8:00 a.m. - 9:45 a.m.

**Category:** Data Management

**Skill Level:** Basic

**Session ID:** DM-101\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** None

**Advanced Prep:** None

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## DM-102\* Working in Harmony: Corptax Office and Excel

Are you using Corptax Office and Excel to maximize your productivity? See how Corptax Office maintains your existing security as it interfaces with Excel in this hands-on session to gather practical solutions to bridge the gap between Excel and Corptax, while maintaining your existing security.

### Objectives:

- Navigate the Corptax Office interface in Excel
- Carry out steps to push book and adjustment amounts from Excel to Corptax
- Examine how to retrieve book, adjusted amounts, and descriptive data from Corptax to Excel

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**Day & Time:** Monday 10:15 a.m. - 12:00 p.m.  
Wednesday 10:15 a.m. - 12:00 p.m.

**Category:** Data Management

**Skill Level:** Basic

**Session ID:** DM-102\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** None

**Advanced Prep:** None

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## DM-103\* Real-time Data Connection: Corptax Office POV and Corptax ODBC Driver

Does a real-time connection to Corptax data within Excel appeal to you? Come on down for a hands-on overview of Corptax Office POV and Corptax ODBC Driver. Discover how to use them, review analytic examples, and much more!

### Objectives:

- Discover the basics of Corptax Office POV and Corptax ODBC driver
- Determine when to use these tools

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 5:30 p.m. Thursday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	DM-103*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## DM-201\* Conquering Importing and Exporting Data

Working too hard to import new formats and forms of data? Do you want to use your Corptax data outside of the system? Take this opportunity to attend this hands-on session, which uses tools to improve your import process and allows the flexibility to change it. Get experience with various methods of exporting both entity properties and amount data from Corptax.

### Objectives:

- Use derived columns to control data you import
- Import Schedule M data and examine rejects
- Build and apply multiple data filters to import state modification data
- Manage data connectors
- Import entity properties
- Import data within DAT files
- Export entity and amount data using either a Query, Report, Data Dictionary Item or Data Source

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 12:00 p.m. Thursday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	DM-201*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## DM-202\* Minicamp: Corptax Office

Upgrade your Corptax Office skills in this hands-on interactive minicamp. Examine formulas, data maps, and templates. Consider advanced techniques to enhance the usability of your Office workpapers.

### Objectives:

- Examine the flow of data between Corptax and Excel
- Use Corptax Office formulas and documentation
- Create and apply data maps and templates to push data into Corptax
- Assess advanced techniques such as data manipulation and extraction

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 5:30 p.m. Wednesday 1:30 p.m. - 5:30 p.m.
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<b>Category:</b>	Data Management
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<b>Skill Level:</b>	Intermediate
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<b>Session ID:</b>	DM-202*
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<b>Duration:</b>	3 Hours 30 Minutes
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<b>CPE Credit:</b>	4
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<b>Interaction Level:</b>	Hands On*
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<b>Subject Area:</b>	Computer Software & Applications
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<b>Prerequisite:</b>	CUS-104* or similar experience
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<b>Advanced Prep:</b>	None
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## DM-203\* Leverage Corptax Office for Your Provision Data

Want to leverage your provision data with Corptax Office? Discover how to submit and retrieve data which is unique to the provision process in this hands-on session.

### Objectives:

- Use Data Maps and Templates to submit data into Corptax
- Identify how to efficiently retrieve provision data using Corptax Office data functions
- Recognize how to retrieve data using Corptax Office Data Connection features

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<b>Day &amp; Time:</b>	Wednesday 1:30 p.m. - 3:15 p.m.
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<b>Category:</b>	Data Management
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<b>Skill Level:</b>	Intermediate
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<b>Session ID:</b>	DM-203*
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<b>Duration:</b>	1 Hour 45 Minutes
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<b>CPE Credit:</b>	2
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<b>Interaction Level:</b>	Hands On*
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<b>Subject Area:</b>	Computer Software & Applications
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<b>Prerequisite:</b>	DM-202* or similar experience
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<b>Advanced Prep:</b>	None
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## DM-204\* Leverage Corptax Office for Your International Data

Want to expand your Corptax Office knowledge using your international data? Locate the tools to submit and retrieve your International data using Corptax Office in this hands-on session.

### Objectives:

- Use Data Maps and Templates to submit data into Corptax
- Identify how to efficiently retrieve International data using Corptax Office data functions
- Recognize how to retrieve data using Corptax Office Data Connection features

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<b>Day &amp; Time:</b>	Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	DM-204*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	DM-202* or similar experience
<b>Advanced Prep:</b>	None

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## DM-205\* Query Your Way to Better Data Management

Queries are powerful tools used to copy, modify, and extract data. In this hands-on session, create queries and manipulate data for troubleshooting, analytics, and more.

### Objectives:

- Distinguish between general and advanced queries
- Compare Corptax and Corptax Web functions
- Build and examine queries and rules
- Use mapping to copy data
- Execute a BOT to start a set of actions

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:45 a.m. Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Data Management
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	DM-205*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## DM-206 Methods & Mastery for Tax Transformation: Data Dependency (NEW)

Store data where and how you need it! As tax departments and organizations continue to work through TCJA requirements, data dependency has become critical—well beyond Federal and International needs. Corptax manages data dependency for all your reporting—all the way down to the state level! You'll learn new methods for using Corptax to store data and eliminate the endless loop of spreadsheet updates and the misstatements, fines, and penalties that accompany missing steps.

### Objectives:

- Understand how common data is used throughout the tax process
- Reduce risk by always maintaining the single version of the truth
- Learn the dependency on specific data from book to taxable income
- Follow data from its source to reporting and relied on for analytics and analysis

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**Day & Time:** Monday 1:30 p.m. - 3:15 p.m.  
Wednesday 3:45 p.m. - 5:30 p.m.

**Category:** Data Management

**Skill Level:** Intermediate

**Session ID:** DM-206

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## Data Reporting & Analytics

Focusing on the data available to you in Corptax, this category will help you see new paths for reporting and analytics. Using the tools and methods discussed, you will be able to mold the data into meaningful reports that the C-Suite will love.

### Data Reporting & Analytics Sessions

Session Name	Day and Time
DRA-001 Leveraging Corptax Data for Analytics and Dashboarding (NEW) <i>Presented by Platinum Sponsor: Deloitte Tax LLP</i>	Tuesday 10:15 a.m. - 11:45 a.m.
DRA-002 Leading Practices for Integrating Alteryx and Corptax (NEW) <i>Presented by Platinum Sponsor: KPMG, LLP</i>	Wednesday 8:00 a.m. - 9:00 a.m.
DRA-003 The Power of Planning with Advantage State Tax Analyzer & Corporate Tax Analyzer (NEW) <i>Presented by Platinum Sponsor: Bloomberg BNA</i>	Wednesday 10:15 a.m. - 11:15 a.m.
DRA-101 Take Reporting to the Next Level with Corptax Web	Monday 1:30 p.m. - 3:15 p.m. Wednesday 1:30 p.m. - 3:15 p.m.
DRA-102 Explore the Next Generation Reporting (NEW)	Tuesday 1:30 p.m. - 3:00 p.m.
DRA-103* How Grouping Data and Posting Calculated Values Improves Reporting	Monday 3:45 p.m. - 5:30 p.m. Thursday 8:00 a.m. - 9:45 a.m.
DRA-104* Microsoft Excel for Optimal Data Use	Monday 10:15 a.m. - 12:00 p.m.
DRA-201 Discover Corptax Tools and Methods to Analyze Your Data	Monday 1:30 p.m. - 2:30 p.m. Wednesday 10:15 a.m. - 11:15 a.m.
DRA-202* See Your Data More Clearly with PivotTables and Power Pivot	Tuesday 10:15 a.m. - 12:00 p.m. Wednesday 3:45 p.m. - 5:30 p.m.
DRA-203* Become an Advanced Excel User	Tuesday 1:30 p.m. - 3:15 p.m. Wednesday 1:30 p.m. - 3:15 p.m.
DRA-204 Get a Better View with Corptax Office Data Analytics Templates	Monday 10:15 a.m. - 12:00 p.m. Wednesday 8:00 a.m. - 9:45 a.m.
DRA-205* TaxShark Tank: Analytics and Dashboards for All Stakeholders (NEW)	Tuesday 1:30 p.m. - 3:15 p.m.
DRA-206 Methods & Mastery for Tax Transformation: Analytics (NEW)	Tuesday 8:00 a.m. - 9:45 a.m. Thursday 10:15 a.m. - 12:00 p.m.



## DRA-001 Leveraging Corptax Data for Analytics and Dashboarding (NEW)

Presented by Platinum Sponsor: Deloitte Tax LLP

You may know that your Corptax database contains valuable tax data, but did you know how easily that data can be leveraged for analytical and dashboard purposes – using tools that you may already license in-house? Please join members of Deloitte’s Tax Management Consulting (TMC) practice as they discuss the options available to tap into your Corptax data and the tools you can use to create key analytical reports. They will also demonstrate examples of reports and dashboards that have been created using Corptax ODBC/POV and analytical tools such as Power BI and Tableau.

### Objectives:

- Understand how to access the data contained inside of the Corptax database
- Recognize the tools that are available to create analytical reports and dashboards
- Know how analytical reports and dashboards can be created using Corptax tools and analytical tools

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<b>Day &amp; Time:</b>	Tuesday 10:15 a.m. - 11:45 a.m.
<b>Category:</b>	Data Reporting & Analytics
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	DRA-001
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Lisa Covelli, Deloitte Tax LLP Beth Putnam, Deloitte Tax LLP Tenzin Sonam, Deloitte Tax LLP

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## DRA-002 Leading Practices for Integrating Alteryx and Corptax (NEW)

Presented by Platinum Sponsor: KPMG, LLP

Leveraging Automation tools like Alteryx within the Tax department is becoming standard practice. But how do you know that you are getting the most out of your Alteryx investments and maximizing the benefits of integrating Alteryx and Corptax? This session will focus on how to plan, build, and maintain Alteryx workflows for Tax leveraging leading practices for design, scalability, and maintenance.

### Objectives:

- Review the leading practices for designing and building Alteryx workflows
- Focus on scalability and maintenance of Alteryx workflows

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<b>Day &amp; Time:</b>	Wednesday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Data Reporting & Analytics
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	DRA-002
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Patricia Wilson, KPMG LLP Amit Ringshia, KPMG LLP

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## DRA-003 The Power of Planning with Advantage State Tax Analyzer & Corporate Tax Analyzer (NEW)

Presented by Platinum Sponsor: Bloomberg BNA

Tax planning is too often considered a nice-to-have for most tax professionals. Planning is typically done in ad-hoc spreadsheets. M&A activity is modeled after the fact. With the sheer amount of data needed for effective planning, most tax departments don't have the time or resources and need to hire expensive third-parties. However, in the tax department of the future, pro-active tax planning can be done quickly and effectively using tools designed with enough tax law for accuracy, but not so much that calculations are not flexible. Learn how effective planning can be done with Advantage State Tax Analyzer and Corporate Tax Analyzer from Bloomberg Tax & Accounting.

### Objectives:

- Why planning in spreadsheets is painful
- How Advantage State Tax Analyzer and Corporate Tax Analyzer can assist
- Real life use cases where effective planning saved the day

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**Day & Time:** Wednesday 10:15 a.m. - 11:15 a.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Overview

**Session ID:** DRA-003

**Duration:** 1 Hour

**CPE Credit:** 1

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** None

**Advanced Prep:** None

**Speaker:** Ryan Sheehan, Sr. Product Manager, Bloomberg Tax & Accounting

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## DRA-101 Take Reporting to the Next Level with Corptax Web

Explore ways to modify report settings and examine aggregation and comparison features through Corptax Web.

### Objectives:

- Differentiate between reports and data sources
- Modify report settings
- Construct reports and Data Collect templates
- Produce comparative reports

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**Day & Time:** Monday 1:30 p.m. - 3:15 p.m.

Wednesday 1:30 p.m. - 3:15 p.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Basic

**Session ID:** DRA-101

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** None

**Advanced Prep:** None

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## DRA-102 Explore the Next Generation Reporting (NEW)

Reporting tools and features designed to improve the experience and take the work out of work. During this session, we will cover what to expect from the newly designed reports and features as well as detailed examples of recommended use.

### Objectives:

- Overview of reporting tools and features
- Discover recommendations for incorporating these reports into your process

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<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 3:00 p.m.
<b>Category:</b>	Data Reporting & Analytics
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	DRA-102
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## DRA-103\* How Grouping Data and Posting Calculated Values Improves Reporting

Puzzled for the best way to group your data for reporting in Corptax? Have you realized the benefits of posting back calculated values to your Corptax database? Sign up for this hands-on session to consider the best uses for grouping tools and how to take advantage of posting calculated values for further reporting and analysis.

### Objectives:

- Differentiate between Custom Groups, Entity Groups, Jurisdiction Groups, and Case Groups
- Conclude how entering ownership information saves time maintaining groups
- Utilize the Entity Management functionality to expand your grouping capabilities
- Post back your calculated values to generate analysis reports

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 5:30 p.m. Thursday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Data Reporting & Analytics
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	DRA-103*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## DRA-104\* Microsoft Excel for Optimal Data Use

Want to see how Excel can do more for you? Join us in this hands-on session to explore Excel features and best practices in analyzing and displaying data.

### Objectives:

- Experiment with quick ways to edit and format data in Excel
- Create Excel tables to analyze Corptax and non-Corptax data
- Use fuzzy lookups to analyze Corptax data

---

<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Data Reporting & Analytics
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	DRA-104*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## DRA-201 Discover Corptax Tools and Methods to Analyze Your Data

See where you can optimize your process and capitalize on existing data using Corptax tools and methods of data analytics.

### Objectives:

- Assess the analytical potential of Corptax
- Consider the analytic possibilities in Corptax reports, Corptax Office, Corptax Advanced Office, as well as Corptax ODBC and API
- Examine the steps to create your own analytical offering and dashboard

---

<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 2:30 p.m. Wednesday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	Data Reporting & Analytics
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	DRA-201
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## DRA-202\* See Your Data More Clearly with PivotTables and Power Pivot

Did you know Microsoft Excel PivotTables can access more than one source of data? In this hands-on session, discover Power Pivot's ability to strengthen the analysis of Corptax Data within your PivotTable. Through one or multiple sources of data, you can slice, dice, and combine data to enhance your Corptax analytics. Take part in this session as it covers Pivot and PowerPivot in Excel: Learn how to connect (ODBC) MS Excel to the Corptax database and effortlessly update reports, period after period.

### Objectives:

- Determine how Excel PivotTables and Power Pivot analyze Corptax data
- Use PivotTables, Power Pivot, and the Data Model to get the most from your Corptax data

---

**Day & Time:** Tuesday 10:15 a.m. - 12:00 p.m.  
Wednesday 3:45 p.m. - 5:30 p.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Intermediate

**Session ID:** DRA-202\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** DRA-104\* or similar experience

**Advanced Prep:** None

---

## DRA-203\* Become an Advanced Excel User

Join this hands-on session to discover advanced Excel features such as: Get & Transform (Power Query), Power View, Spreadsheet Comparison, and Inquire.

### Objectives:

- Use Excel tools to analyze your Corptax data
- Examine four advanced Excel features
- Take part in cleaning and transforming Corptax data in Excel
- Create interactive analytics and dashboards
- Analyze and audit your workbooks for problems and inconsistencies

---

**Day & Time:** Tuesday 1:30 p.m. - 3:15 p.m.  
Wednesday 1:30 p.m. - 3:15 p.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Intermediate

**Session ID:** DRA-203\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** DRA-104\* or similar experience

**Advanced Prep:** None

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## DRA-204 Get a Better View with Corptax Office Data Analytics Templates

If you license Corptax Office (or are thinking about it), join this demo to see Excel templates that analyze your Corptax data around Country-by-Country (CbC) reporting, Provision, and State Apportionment. Take part in a discussion while designing other Corptax Office analytics spreadsheets.

### Objectives:

- Examine ready-made Corptax Office templates that help you analyze your Country-by-Country reporting, Provision data, and apportionment analysis
- Consider other templates that Corptax created for customers
- Collaborate with peers on other ways to analyze Corptax data in a round-table discussion

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**Day & Time:** Monday 10:15 a.m. - 12:00 p.m.  
Wednesday 8:00 a.m. - 9:45 a.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Intermediate

**Session ID:** DRA-204

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Interactive

**Subject Area:** Computer Software & Applications

**Prerequisite:** DM-102\* or similar experience

**Advanced Prep:** None

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## DRA-205\* TaxShark Tank: Analytics and Dashboards for All Stakeholders (NEW)

Dream It, Pitch It! Based on the popular TV show, this interactive series teaches you how to spend more time analyzing data instead of preparing, formatting, and extracting the data. Collaborate with a peer team, then get judged by a 'Corptax pro' panel who recognize and elevate the best ideas—everyone learns. Discover how to build a refreshable file that utilizes dashboards to create high-level analysis with transparency to underlying data, and provide C-Suite data for visualizing quickly while not being bogged down in the numbers.

### Objectives:

- Learn how data is structured and stored in Corptax and used for updating analysis and analytic reporting
- Discover what other tax teams are doing with data in Corptax
- Collaborate to build your own analytics and dashboards based on data that matters to you

---

**Day & Time:** Tuesday 1:30 p.m. - 3:15 p.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Intermediate

**Session ID:** DRA-205\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## DRA-206 Methods & Mastery for Tax Transformation: Analytics (NEW)

Satisfy the C-suite with 'now' analytics! Hear how to quickly compare key data points from multiple sources and files to the calculations within the tax data. Learn how to remove bottlenecks with current process—manually compiling all files into a single file. Learn how to use repeatable workflow prep, blend, and analyze all relevant tax data.

### Objectives:

- Create a direct connection to data using the tools your teams have today
- Understand data drivers available to streamline your analytic process
- Build your own analytics
- Connect and display data using tools you are familiar with today

---

**Day & Time:** Tuesday 8:00 a.m. - 9:45 a.m.  
Thursday 10:15 a.m. - 12:00 p.m.

**Category:** Data Reporting & Analytics

**Skill Level:** Intermediate

**Session ID:** DRA-206

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** CUS-104\* or similar experience

**Advanced Prep:** None

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## Entity Management

Check out the offerings in this category to learn how entity management can help your organization use a common platform to easily track, retrieve, store, and share entity information.

### Entity Management Sessions

Session Name	Day and Time
EM-001 Client Success Stories: Entity Management (NEW)	Wednesday 3:45 p.m. - 4:45 p.m.
EM-201* Unleash the Potential of Entity Properties, Groups, and Views	Monday 1:30 p.m. - 3:15 p.m.
EM-202 Get Familiar with Entity Obligations and Entity Obligation Properties (NEW)	Monday 3:45 p.m. - 5:30 p.m. Thursday 10:15 a.m. - 12:00 p.m.
EM-203* TaxShark Tank: Break Away from Legal with Entity Management (NEW)	Wednesday 8:00 a.m. - 9:45 a.m.
EM-204 Methods & Mastery for Tax Transformation: Entity Management (NEW)	Tuesday 10:15 a.m. - 12:00 p.m. Thursday 8:00 a.m. - 9:45 a.m.

### Related Session

Session Name	Day and Time
SS-023 Manage Legal Entity Reporting Changes & Update Corptax for ERP Implementations (NEW)	Monday 1:30 p.m. - 2:30 p.m.
<i>Presented by Gold Sponsor: Grant Thornton</i>	



## EM-001 Client Success Stories: Entity Management (NEW)

The entity structure is critical to compliance filings. Join this interactive session to learn first-hand from your peers how they are using Entity Management to keep track and manage their data.

### Terry Woerner - Siemens Corporation

Using Entity Management to gather all data necessary to begin the tax compliance process.

### Heidi Schaefer - nVent

Understand how Entity Management meets nVent's needs and how it can help you too.

#### Objectives:

- Share Entity Management success stories
- Determine how these tools can help your process

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<b>Day &amp; Time:</b>	Wednesday 3:45 p.m. - 4:45 p.m.
<b>Category:</b>	Entity Management
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	EM-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## EM-201\* Unleash the Potential of Entity Properties, Groups, and Views

Want to create and store unique entity properties in Corptax to track non-standard attributes? Join this hands-on session exploring ways to use standard and non-standard attributes to organize entity properties into different groups and views using Corptax tools like Visual Org and Corptax Office.

#### Objectives:

- Differentiate between standard and user-defined attributes
- Organize entity properties into groups and views using tools such as Visual Org and Corptax Office
- Modify security settings for entity views to reduce errors within your entity data
- Identify methods for determining entity group membership

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 3:15 p.m.
<b>Category:</b>	Entity Management
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	EM-201*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## EM-202 Get Familiar with Entity Obligations and Entity Obligation Properties (NEW)

Did you know that Entity Obligations and Entity Obligation Properties have been around for a few years now? Do you know what they are for, what they drive now and will in the future? Join us for this interactive session and we will help you answer these questions and reveal tasks that can be done before next filing season to ensure you are ready to maximize the use of the tools.

### Objectives:

- Obtain an understanding of the Entity Obligations and Entity Obligation Properties
- Create an action plan for populating so that data is available for next filing season

<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 5:30 p.m. Thursday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Entity Management
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	EM-202
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## EM-203\* TaxShark Tank: Break Away from Legal with Entity Management (NEW)

Dream It, Pitch It! Based on the popular TV show, this interactive series teaches you how to uncover and quickly explain trends, data anomalies, and outlier outcomes for all levels of reporting. Collaborate with a peer team, then get judged by a 'Corptax pro' panel who recognize and elevate the best ideas—everyone learns! Walk away with the knowledge to create a legal entity database—the focal point for your entity structure to be used by your entire organization; understand changes to your structure using custom attributes, org charts, and analytics; and store and access what matters.

### Objectives:

- Use Entity Management and visual org tools to update organization structure changes
- See how tax teams and legal teams use Corptax as a system of record for legal entity data
- Understand how entity data is stored and reused throughout the tax process

<b>Day &amp; Time:</b>	Wednesday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Entity Management
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	EM-203*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	EM-201* or similar experience
<b>Advanced Prep:</b>	None

## EM-204 Methods & Mastery for Tax Transformation: Entity Management (NEW)

Learn how a centralized database for entity management helps your organization use a common platform to easily track, retrieve, store, and share entity data and documents. Start by building a foundation for storing current and historical information for legal entities and easily track changes through mergers and acquisitions. Create user-defined attributes and visualize organization charts based on what matters to you and your company.

### Objectives:

- Realize the potential of entity data currently stored in Corptax
- Gather and store data based on entity attributes already in Corptax
- Visualize entities and attributes with visual org tools and share throughout organization

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**Day & Time:** Tuesday 10:15 a.m. - 12:00 p.m.  
Thursday 8:00 a.m. - 9:45 a.m.

**Category:** Entity Management

**Skill Level:** Intermediate

**Session ID:** EM-204

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** EM-201\* or similar experience

**Advanced Prep:** None

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## General

Join General sessions where Corptax leadership shares their vision of the future and product direction, so you can transform your business of tax. Checkout our annual Feed My Starving Children event which gives you the opportunity to pack meals for children around the world.

### General Sessions

Session Name	Day and Time
GS-001 General Session	Monday 8:30 a.m. - 9:45 a.m.
GS-002 Closing Session	Thursday 12:00 p.m. - 12:45 p.m.
GS-003 Feed My Starving Children	Tuesday 3:45 p.m. - 5:45 p.m.
GS-004 Product Update: What's on the Horizon for Corptax	Monday 1:30 p.m. - 3:15 p.m. Wednesday 1:30 p.m. - 3:15 p.m.
GS-005 What will the new Corptax architecture mean to you? (NEW)	Tuesday 10:15 a.m. - 11:45 a.m. Thursday 10:15 a.m. - 11:45 a.m.

## GS-001 General Session

Join us at the General session to discover information you won't hear anywhere else. Learn about the new and exciting pathways ahead for Corptax. Get inspired by the success of your peers during the unveiling of the Tax Transformer Awards finalists. We'll also share tips about getting the most out of the conference week.

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<b>Day &amp; Time:</b>	Monday 8:30 a.m. - 9:45 a.m.
<b>Category:</b>	General
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	GS-001
<b>Duration:</b>	1 Hour 15 Minutes
<b>CPE Credit:</b>	0
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## GS-002 Closing Session

Recap your conference week with closing remarks from CSC Corptax President Dave Shea, review the action-packed week through video, and stay for the generous end-of-conference prize drawings.

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<b>Day &amp; Time:</b>	Thursday 12:00 p.m. - 12:45 p.m.
<b>Category:</b>	General
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	GS-002
<b>Duration:</b>	45 Minutes
<b>CPE Credit:</b>	0
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## GS-003 Feed My Starving Children

A moment of your time will help millions around the world with the Feed My Starving Children MobilePack meal production! By volunteering together, you will take part in changing the lives of children and developing communities.

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<b>Day &amp; Time:</b>	Tuesday 3:45 p.m. - 5:45 p.m.
<b>Category:</b>	General
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	GS-003
<b>Duration:</b>	2 Hours
<b>CPE Credit:</b>	0
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## GS-004 Product Update: What's on the Horizon for Corptax

Join this session to see new and upcoming changes in the Corptax products that will improve efficiency, transparency, and ease of product use. We will also discuss planned enhancements for the upcoming 2020 product year. Join us and have an impact on the future by providing feedback during the session as well.

### Objectives:

- Experience firsthand the exciting changes in store for Corptax in 2020
- Consider how the improvements in efficiency, transparency, and ease of use will impact your department
- Provide feedback on the changes to make your mark on the future development

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 3:15 p.m. Wednesday 1:30 p.m. - 3:15 p.m.
<b>Category:</b>	General
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	GS-004
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## GS-005 What will the new Corptax architecture mean to you? (NEW)

Join this session for an interactive discussion on the new Corptax architecture. Changes are driven by not only tax law changes but also with the intent of 'taking work out of the work'. We will review the changes that have rolled out as well as those coming and discuss the impact on current and future processes.

### Objectives:

- Review the released and proposed future architecture changes
- Discuss the impact on your current and future processes

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**Day & Time:** Tuesday 10:15 a.m. - 11:45 a.m.  
Thursday 10:15 a.m. - 11:45 a.m.

**Category:** General

**Skill Level:** Overview

**Session ID:** GS-005

**Duration:** 1 Hour 30 Minutes

**CPE Credit:** 1.5

**Interaction Level:** Lecture

**Subject Area:** Computer Software & Applications

**Prerequisite:** None

**Advanced Prep:** None

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## Insurance

In these sessions, discuss current topics with peers and dive into complex topics like loss reserve discounting and life/non-life consolidations.

### Insurance Sessions

Session Name	Day and Time
IN-001 Issues and Trends for Insurance: Peer Collaboration	Monday 10:15 a.m. - 11:15 a.m.
IN-002 Corptax in the Insurance Industry (NEW) <i>Presented by Platinum Sponsor: Deloitte Tax LLP</i>	Monday 3:45 p.m. - 5:15 p.m.
IN-301 Advanced Insurance Concepts: Workpapers, Calculations and Custom Solutions	Wednesday 3:45 p.m. - 5:30 p.m.



## IN-001 Issues and Trends for Insurance: Peer Collaboration

Collaborate on issues and trends in the insurance industry. Take part in a discussion on law changes and product updates.

### Objectives:

- Discuss topics with a Corptax representative and your peers
- Gather information on changes for Insurance Compliance and Provision

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	Insurance
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IN-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## IN-002 Corptax in the Insurance Industry (NEW)

*Presented by Platinum Sponsor: Deloitte Tax LLP*

You've implemented Corptax, and are using it to successfully produce provision reports, and to file tax returns, so now what? Join members of New York Life and Deloitte as they discuss Phase 2 of their ongoing tax process improvement implementations. Learn how general ledger trial balances and NAIC information can be used together for compliance preparation, and the next steps in automating key processes and reports, such as the tax basis balance sheet.

### Objectives:

- Understand the best way to customize tax returns, when required
- Identify steps to implement to reduce risks when key resources leave the organization
- Recognize potential challenges when using Corptax Adjustment Automation related to Line of Business calculations
- Identify and prioritize future process improvement opportunities

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 5:15 p.m.
<b>Category:</b>	Insurance
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IN-002
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Staci Schluechtermann, Deloitte Tax LLP Mei Chen, New York Life Michelle Teehan, New York Life

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## IN-301 Advanced Insurance Concepts: Workpapers, Calculations and Custom Solutions

Master advanced insurance concepts, including how to calculate your loss reserve discount and consolidate your life/non-life companies. Understand how to complete the loss reserve discount using Corptax calculations as well as how to prepare a life/non-life return.

### Objectives:

- Examine Corptax workpapers
- Review the life/non-life calculations
- Discuss custom solutions

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<b>Day &amp; Time:</b>	Wednesday 3:45 p.m. - 5:30 p.m.
<b>Category:</b>	Insurance
<b>Skill Level:</b>	Advanced
<b>Session ID:</b>	IN-301
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## International

Select sessions based on your need for international compliance. These sessions highlight software enhancements impacting the International Compliance process and the impact of the TCJA.

### International Sessions

Session Name	Day and Time
IC-001 International User Group Meeting	Monday 5:45 p.m. - 6:45 p.m.
IC-002 Product Update: International	Wednesday 8:00 a.m. - 9:45 a.m.
IC-003 Tax Update: International (NEW) <i>Presented by Platinum Sponsor: KPMG, LLP</i>	Monday 10:15 a.m. - 11:15 a.m.
IC-004 International & TCJA Topics: Peer Roundtable	Thursday 10:15 a.m. - 11:15 a.m.
IC-005 How to Get a Step-Up on Next Year's International Compliance (NEW)	Wednesday 1:30 p.m. - 2:30 p.m.
IC-101* Introduction to Corptax International Compliance - Foreign & e-File	Monday 10:15 a.m. - 5:30 p.m.
IC-102* Introduction to International Compliance - Form 1118	Tuesday 8:00 a.m. - 3:15 p.m.
IC-103 Straight to the Point: International Tips & Tricks (NEW)	Thursday 1:45 p.m. - 3:30 p.m.
IC-104 Master the New International Reports (NEW)	Thursday 8:00 a.m. - 9:00 a.m.
IC-201* Corptax International Reports for Foreign Compliance	Monday 1:30 p.m. - 3:15 p.m.
IC-202* Streamline Form 1118 with Corptax International Reports	Monday 3:45 p.m. - 5:30 p.m.
IC-203* Intermediate International Compliance - Foreign and Domestic	Tuesday 1:30 p.m. - 3:15 p.m.
IC-204* Corptax International: Administration and Management	Tuesday 10:15 a.m. - 12:00 p.m.
IC-205* Use Corptax International for Disregarded Entities and Form 8858 Reporting (NEW)	Wednesday 3:45 p.m. - 5:30 p.m.
IC-206 International Forms have been filed....Are you ready for what comes next? (NEW)	Tuesday 8:00 a.m. - 9:00 a.m.
IC-301* Prepare Form 8865 Using Pass Through with Corptax International	Tuesday 8:00 a.m. - 12:00 p.m.

### Related Session

Session Name	Day and Time
CB-202* Minicamp: Automate BEPS Reporting with Corptax	Thursday 8:00 a.m. - 12:00 p.m.
DM-204* Leverage Corptax Office for Your International Data	Thursday 1:45 p.m. - 3:30 p.m.

## IC-001 International User Group Meeting

Discover how tax law changes are being incorporated into the Corptax International product. Network with Corptax International users and Corptax International Support and Development professionals.

### Objectives:

- Consider changes built into Corptax International to accommodate the tax law changes and how they have impacted your international process
- Examine the International features currently under development
- Collaborate with other International users

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<b>Day &amp; Time:</b>	Monday 5:45 p.m. - 6:45 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IC-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## IC-002 Product Update: International

You have seen the transformational changes that started over a year ago with TCJA and Corptax. Join this session to see how these changes will continue in 2020 and beyond.

### Objectives:

- Examine the transformational changes for Corptax International
- Consider the impact of the changes on your processes
- Preview the changes planned for Corptax 2020

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<b>Day &amp; Time:</b>	Wednesday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IC-002
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## IC-003 Tax Update: International (NEW)

*Presented by Platinum Sponsor: KPMG, LLP*

One year in to the post-reform world, what have we learned and what trends are occurring—in the United States and abroad? We will provide you with a brief update of the current environment for legislative, compliance, planning, and other aspects of the current tax world in which multinationals exist.

### Objectives:

- Review the recent updates for International taxation
- Identify the related compliance issues that your business might face

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IC-003
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Todd Schorb, KPMG LLP

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## IC-004 International & TCJA Topics: Peer Roundtable

Engage in a discussion on the use of Corptax International and overcome the compliance and TCJA challenges to achieve a successful tax return filing. Discover tips and tricks used by other clients and the Corptax pros that improve and streamline your compliance processes with innovative techniques.

### Objectives:

- Collect new best practices to incorporate into your process
- Consider tips and tricks to enhance your international practices

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<b>Day &amp; Time:</b>	Thursday 10:15 a.m. - 11:15 a.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IC-004
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## IC-005 How to Get a Step-Up on Next Year's International Compliance (NEW)

Presented by Platinum Sponsor: EY LLP

With the first year of TCJA compliance behind most taxpayers, are you trying to get a leg up on next year's compliance process? EY will discuss some of the grappling issues taxpayers faced with the new TCJA forms and instructions, steps and ideas to consider before next year's compliance, elections, accounting method changes etc., and insight into potential future changes to forms, instructions and compliance issues.

### Objectives:

- Bringing clarity to complex forms and instructions
- Actions to take before next year's compliance

<b>Day &amp; Time:</b>	Wednesday 1:30 p.m. - 2:30 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	IC-005
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## IC-101\* Introduction to Corptax International Compliance - Foreign & e-File

Successfully complete the international tax compliance process while you gain fundamental knowledge and skills. Learn how Corptax International helps you automate and process:

- Tested GILTI income for all U.S. shareholders
- Source income for new baskets
- Identify attributes to determine deduction-eligible income
- Track 951A inclusions for historical E&P
- Segregate expenses paid within the U.S. vs. to foreign-related parties

This hands-on session gives you the chance to complete the necessary steps for automating and preparing Forms 5471 and 8858 for foreign-owned disregarded entities (DREs). *Note:* For information on importing foreign trial balances and other data, see *DM-101\* Corptax Data Import From A - Z* session.

### Objectives:

- Discover how the Corptax International Foreign Compliance can streamline your process
- Record E&P adjustments using both a manual process and automated adjustments
- Discover how to source foreign amounts and consider the impact of sourcing on calculations of earnings & profits
- Process international calculations and post results to the foreign forms
- Prepare Form 5471 and Schedules
- Create and troubleshoot the MeF files for e-File

<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 5:30 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	IC-101*
<b>Duration:</b>	5 Hours 15 Minutes
<b>CPE Credit:</b>	6
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## IC-102\* Introduction to International Compliance - Form 1118

This hands-on session gives you the opportunity to complete the necessary steps for automating and preparing Form 1118. Discover how Corptax International automates data for presentation of the foreign tax credit by income basket. Complete the steps and learn best practices when computing and reviewing whitepaper reports for:

- A corporation's income or loss including new categories
- Directly allocating expenses including GILTI & FDII
- Determining exempt income and assets
- Reviewing data sourced from foreign distributions
- Deemed taxes paid

### Objectives:

- Examine the sourcing of adjusted domestic trial balance amounts
- Discover how to apportion expenses such as interest and R&D
- Post Subpart F, Gross-Up, and other Schedule M entries to Form 1120 shareholders
- Reconcile data on Form 1118 to supporting reports

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 3:15 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	IC-102*
<b>Duration:</b>	5 Hours 15 Minutes
<b>CPE Credit:</b>	6
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## IC-103 Straight to the Point: International Tips & Tricks (NEW)

Are you looking for insight on how to use Corptax more efficiently? You will want to join this session to gather information on how Corptax can help you meet the filing requirements of Tax Cuts and Jobs Act. You will also gather valuable tips and tricks on topics, like e-file & tax rates, that can improve how you use Corptax.

### Objectives:

- Discuss how key aspects of the Tax Cuts and Jobs Act have been incorporated into Corptax calculations
- Identify tips and tricks for driving efficiencies in your International data collection efforts and ideas for processing
- Highlight key changes that will affect your e-Filing process for International forms

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<b>Day &amp; Time:</b>	Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	IC-103
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## IC-104 Master the New International Reports (NEW)

Corptax is making exciting changes around how International reports are created and how you can use them. These changes lay the groundwork for how all reports will be handled in the future. This course will give you insight to the benefits and standards used in the new reports. You will review existing reports designed on the new platform and get a glimpse into what is planned for the future.

### Objectives:

- Review the benefits of Corptax's new approach for designing reports
- Discuss how standards will enhance reporting presentation
- Highlight existing reports that you can begin using now and hear about what reports are planned for the future

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	IC-104
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

## IC-201\* Corptax International Reports for Foreign Compliance

Take a deeper dive to understanding your complex international calculations. This hands-on session takes you through creating and matching relevant international whitepaper reports to backup earnings and profits computation of your controlled foreign corporations—as well provide 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

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 3:15 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	IC-201*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	IC-101* or similar experience
<b>Advanced Prep:</b>	None



## IC-202\* Streamline Form 1118 with Corptax International Reports

This hands-on session takes you through creating and matching relevant international whitepaper reports to backup 861 apportionment factors and foreign tax credit calculation as well provide details to support the new income baskets. Learn how you can review these reports for accurate calculations and identify needed corrections before finalizing the federal tax forms for federal e-filing.

### Objectives:

- Use reports provided by Corptax to reconcile various Form 1118 schedules
- Identify reports that support the 861 apportionment factors
- Locate reports that support the Foreign Tax Credit calculation on Form 1118

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 5:30 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	IC-202*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	IC-102* or similar experience
<b>Advanced Prep:</b>	None

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## IC-203\* Intermediate International Compliance - Foreign and Domestic

Develop your skills to allocate and apportion expenses in this hands-on session. Determine the proper setup for complex calculations for Domestic Production Deduction as well as Interest Netting. Listen to a review of the tracking of domestic attributes, which impacts the overall foreign tax credit calculations such as: NOL, OFL, ODL, and SLL.

### Objectives:

- Develop customized expense apportionment
- Examine overall domestic carryover attributes

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<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 3:15 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	IC-203*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	IC-101* or similar experience
<b>Advanced Prep:</b>	None

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## IC-204\* Corptax International: Administration and Management

Want to streamline the administration tasks of managing acquisitions, liquidations, and reorganizations relating to the International calculations? Join this hands-on session to discover how the system tracks profile attributes such as entity type and ownership, by year or date of change. Upon completion you will better understand how entity profile data impacts E&P record-keeping in complex ownership scenarios.

### Objectives:

- Recognize how company profiles impact international compliance and Visual Org
- Discover how to manage your entity data using Properties and View
- Consider accounts and adjustments for international compliance
- Review annual maintenance tasks for international compliance

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**Day & Time:** Tuesday 10:15 a.m. - 12:00 p.m.

**Category:** International

**Skill Level:** Intermediate

**Session ID:** IC-204\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** IC-101\*, IC-102\*, or similar experience

**Advanced Prep:** None

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## IC-205\* Use Corptax International for Disregarded Entities and Form 8858 Reporting (NEW)

New regulations for disregarded entities have expanded the reporting requirements. Join this hands-on session to get examine key steps for setting up and tracking disregarded entities within Corptax. Gain valuable insight on how to properly generate Form 8858 returns for your disregarded entities.

### Objectives:

- Discuss key factors that affect how you set-up and track disregarded entities in Corptax
- Perform the necessary setup for disregarded entities
- Review key considerations for completing Form 8858

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**Day & Time:** Wednesday 3:45 p.m. - 5:30 p.m.

**Category:** International

**Skill Level:** Intermediate

**Session ID:** IC-205\*

**Duration:** 1 Hour 45 Minutes

**CPE Credit:** 2

**Interaction Level:** Hands On\*

**Subject Area:** Computer Software & Applications

**Prerequisite:** IC-101\* or similar experience

**Advanced Prep:** None

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## IC-206 International Forms have been filed....Are you ready for what comes next? (NEW)

The Tax Cuts and Jobs Act has been the most sweeping tax reform in the last 30 years, especially if you report on foreign entities. You did your best to gather the information and meet the filing deadlines, but are you 100% certain your tax returns are perfect? Join this session to discuss with peers and Corptax professionals about how to be prepared for IRS audit requests. Get an overview of key steps for completing an amended return and ensuring your audit adjustments are properly incorporated for future years.

### Objectives:

- Discuss with peers the key areas auditors will focus on for tax year 2017 and 2018
- Collaborate on how you can use Corptax to respond to audit request concerning your foreign entities
- Review the steps for completing and e-filing an amended return for your foreign entities
- Identify the steps for ensuring audit adjustments are incorporated into your future returns

<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	IC-206
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	IC-101*, IC-102*, or similar experience
<b>Advanced Prep:</b>	None

## IC-301\* Prepare Form 8865 Using Pass Through with Corptax International

Step through preparing Foreign Partnership compliance using the Pass Through module along with Corptax International. In this session, gain hands-on experience reporting for controlled foreign partnerships (8865). Learn how automating partnership interest and incorporating the international calculations makes filing the 8865 almost effortless. We will explore topics including mixed domicile structures, automated tiering, special allocations, and integration of foreign partnership activity into the consolidated E&P of foreign partners.

### Objectives:

- Identify the additional setup a partnership requires
- Recognize the purpose of 8865 calcs
- Prepare the partnership return
- Discover how to work with functional currency trial balances to prepare the form and include in partner's E&P
- Indicate how tiering integrates into Corptax International
- Review the methods to include DREs in Form 8865 and partnerships in Form 5471

<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	International
<b>Skill Level:</b>	Advanced
<b>Session ID:</b>	IC-301*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	IC-101*, IC-102*, or similar experience
<b>Advanced Prep:</b>	None

## Provision

From start to finish, you are covered in this Provision category. There are boot camps for new users, and intermediate topics for experienced users.

### Provision Sessions

Session Name	Day and Time
PR-001 Provision User Group Meeting	Monday 5:45 p.m. - 6:45 p.m.
PR-002 Provision Topics: Peer Roundtable	Monday 3:45 p.m. - 4:45 p.m.
PR-003 Corptax Provision – Enhancing our Implementation (NEW) <i>Presented by Platinum Sponsor: Deloitte Tax LLP</i>	Monday 1:30 p.m. - 3:00 p.m.
PR-004 Provision Developments (NEW) <i>Presented by Platinum Sponsor: Deloitte Tax LLP</i>	Tuesday 1:30 p.m. - 3:00 p.m.
PR-005 Optimizing Provision: Typical Challenges & Solutions (NEW) <i>Presented by Platinum Sponsor: BDO</i>	Wednesday 3:45 p.m. - 5:15 p.m.
PR-006 Client Success Stories: Provision (NEW)	Tuesday 8:00 a.m. - 9:00 a.m.
PR-101 The Best of Provision Product Adoption	Tuesday 10:15 a.m. - 12:00 p.m. Thursday 1:45 p.m. - 3:30 p.m.
PR-102 AIT Provision Process: From Start to Finish	Monday 10:15 a.m. - 11:45 a.m. Wednesday 8:00 a.m. - 9:30 a.m.
PR-201* Deeper Dive into Corptax Accounting for Income Taxes (AIT)	Wednesday 8:00 a.m. - 12:00 p.m.
PR-251* Bootcamp: Legacy Provision	Monday 10:15 a.m. - 5:30 p.m.
PR-252 Legacy State Provision - Blended and State by State Approach	Thursday 8:00 a.m. - 9:45 a.m.
PR-253* Interim Reporting (Legacy)	Thursday 10:15 a.m. - 12:00 p.m.

### Related Sessions

Session Name	Day and Time
DM-203* Leverage Corptax Office for Your Provision Data	Wednesday 1:30 p.m. - 3:15 p.m.
SS-024 Implementing Corptax Compliance Concurrently with Other Systems (NEW) <i>Presented by Gold Sponsor: Grant Thornton</i>	Tuesday 1:30 p.m. - 2:30 p.m.

## PR-001 Provision User Group Meeting

Attend this annual Provision user group meeting to share experiences and processes with your peers.

### Objectives:

- Examine Provision features from a user's perspective
- Collaborate on topics with your peers

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<b>Day &amp; Time:</b>	Monday 5:45 p.m. - 6:45 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	PR-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## PR-002 Provision Topics: Peer Roundtable

Discover Provision processes and methods used by your peers.

### Objectives:

- Examine successful methods to use Provision
- Collaborate on topics with peers

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 4:45 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	PR-002
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## PR-003 Corptax Provision – Enhancing our Implementation (NEW)

*Presented by Platinum Sponsor: Deloitte Tax LLP*

When implementing Corptax provision, some process improvements may be set aside for future enhancements, due to time constraints, resource availability, or anticipated future changes in source data. Join Ecolab and Deloitte as they discuss the steps that they followed, and the challenges they faced when implementing Phase 2 of Corptax Provision.

### Objectives:

- Understand the importance of revisiting previous design sessions
- Identify a testing process that will not impact the live provision process
- Recognize potential challenges when using spreadsheet data solutions and related macros
- Develop a plan to roll out improvements to off-site locations

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<b>Day &amp; Time:</b>	Monday 1:30 p.m. - 3:00 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	PR-003
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Staci Schluetchermann, Deloitte Tax LLP Bill Hamann, Ecolab Morgan Horne, Ecolab

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## PR-004 Provision Developments (NEW)

*Presented by Platinum Sponsor: Deloitte Tax LLP*

Be ahead of the curve and get the latest information on tax law changes that may impact your tax provision. The tax specialists leading this course will not only provide you with provision developments, they will also discuss how those developments may affect your Corptax setup.

### Objectives:

- Understand the latest tax law changes that may impact tax provision calculations
- Understand the interplay between the tax law changes and Corptax

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<b>Day &amp; Time:</b>	Tuesday 1:30 p.m. - 3:00 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	PR-004
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## PR-005 Optimizing Provision: Typical Challenges & Solutions (NEW)

*Presented by Platinum Sponsor: BDO*

BDO's Tax Performance Engineering team works with companies to design optimized processes, organize and format their source data and tax calculations, document processes, and enhance the use of technology, with the goal of streamlining tax reporting processes. In this session, we will identify and discuss common tax provision process challenges and review Corptax Provision configuration options that can reduce the time spent resolving these issues.

Through our experience with a broad range of client challenges, we've discovered that performance can be optimized by:

1. Taking a step back and looking at your complete life-cycle of income tax data
2. Designing processes that fit your company's tax deliverables and data format
3. Choosing the right configuration options within Corptax Provision
4. Complementing Corptax Provision using Corptax add-on tools such as Corptax Office, Corptax BOTS and others
5. Utilizing complimentary tools from Alteryx and Microsoft to enhance functionality and ease of use

### Objectives:

- Identify your organization's specific challenges related to your provision process
- Evaluate available tools within your organization
- Recognize the areas of the provision process that would benefit from the application of special processing or tools

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<b>Day &amp; Time:</b>	Wednesday 3:45 p.m. - 5:15 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	PR-005
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None
<b>Speakers:</b>	Scott Hice, BDO Jonathan Spiegel, BDO

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## PR-006 Client Success Stories: Provision (NEW)

Hear directly from your peers how they are leveraging data to boost their provision process and reporting.

### Heidi Schaefer, nVent

Employ analytics to expand on the current Corptax reporting to allow a clearer picture of the payable and NOL/VA attributes.

### Karl Winderl and Paul Lowman, WW Grainger

Using Corptax Office connectivity and data imports, Grainger has been able to improve accuracy and efficiency around its tax provision.

#### Objective:

- Identify tools to make your provision process more efficient

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<b>Day &amp; Time:</b>	Tuesday 8:00 a.m. - 9:00 a.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	PR-006
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Case Study
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## PR-101 The Best of Provision Product Adoption

Discover tips and tricks to unleash the power of Corptax Provision.

#### Objectives:

- Explore processes from specialists and users
- Identify tips and tricks you can use

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<b>Day &amp; Time:</b>	Tuesday 10:15 a.m. - 12:00 p.m. Thursday 1:45 p.m. - 3:30 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	PR-101
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## PR-102 AIT Provision Process: From Start to Finish

Want to improve your provision process using Corptax Accounting for Income Taxes (AIT)? Discover how AIT provides ease of use, transparency, reporting, and performance improvement.

### Objectives:

- Consider the benefits of using AIT
- Examine tools to improve the manual process

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 11:45 a.m. Wednesday 8:00 a.m. - 9:30 a.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Basic
<b>Session ID:</b>	PR-102
<b>Duration:</b>	1 Hour 30 Minutes
<b>CPE Credit:</b>	1.5
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## PR-201\* Deeper Dive into Corptax Accounting for Income Taxes (AIT)

Ready for the new Corptax Accounting for Income Taxes (AIT) experience? In this hands-on session, produce an end-to-end provision including federal, national, and local provision calculations from book balances to the reconciliation of tax accounts, effective tax rate analysis, and financial statement disclosures.

### Objectives:

- Navigate in Corptax Web
- Discover new functionality related to the AIT product
- Analyze reports and examine aggregation capabilities, variance reporting, and rollups

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<b>Day &amp; Time:</b>	Wednesday 8:00 a.m. - 12:00 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	PR-201*
<b>Duration:</b>	3 Hours 30 Minutes
<b>CPE Credit:</b>	4
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## PR-251\* Bootcamp: Legacy Provision

Using Excel to complete your Provision? This hands-on session guides you through the setup to reviewing reports using Corptax Provision.

### Objectives:

- Examine profiles
- Validate adjustment and tax attribute data
- Take part in processing batch execution
- Review reports, including comparison reporting and rollups

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 5:30 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	PR-251*
<b>Duration:</b>	5 Hours 15 Minutes
<b>CPE Credit:</b>	6
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## PR-252 Legacy State Provision - Blended and State by State Approach

This session takes a look at blended and the state-by-state method of calculating your state provision using legacy Corptax Provision. Discuss setting up profiles to running reports specific to the state provision process. Analyze how your state amounts flow into the federal provision.

### Objectives:

- Examine key profiles for state provision
- Differentiate the data entry for the blended and state by state method
- Review the State Provision reports and examine how the amounts flow into the federal provision

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<b>Day &amp; Time:</b>	Thursday 8:00 a.m. - 9:45 a.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	PR-252
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

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## PR-253\* Interim Reporting (Legacy)

Uncover the mystery with interim reporting. In this hands-on session, carry out the steps of calculating your interim tax rate using two methods.

### Objective:

- Take part in the steps of calculating using the Tax Rate Computation and Tax Rate Data Entry Methods

<b>Day &amp; Time:</b>	Thursday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Provision
<b>Skill Level:</b>	Intermediate
<b>Session ID:</b>	PR-253*
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	2
<b>Interaction Level:</b>	Hands On*
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	CUS-104* or similar experience
<b>Advanced Prep:</b>	None

## Support & Consult

Looking for answers, help or ways to improve your process? Or looking to have an impact on the tools of the future? Then checkout the sessions in this category...as we offer insight into support tools, access to Corptax experts in the Transformation Workshop and the new Meet with Corptax! where you are center stage.

### Support & Consult Sessions

Session Name	Day and Time
SC-001 Maximize Your Corptax Support Tools	Monday 3:45 p.m. - 4:45 p.m. Thursday 1:45 p.m. - 2:45 p.m.
SC-002 Tax Transformation Workshop	Monday 10:15 a.m. - 12:00 p.m. Monday 1:30 p.m. - 3:15 p.m. Monday 3:45 p.m. - 5:30 p.m. Tuesday 8:00 a.m. - 9:45 a.m. Tuesday 10:15 a.m. - 12:00 p.m. Tuesday 1:30 p.m. - 3:15 p.m. Tuesday 3:45 p.m. - 5:30 p.m. Wednesday 8:00 a.m. - 9:45 a.m. Wednesday 10:15 a.m. - 12:00 p.m. Wednesday 1:30 p.m. - 3:15 p.m. Wednesday 3:45 p.m. - 5:30 p.m. Thursday 8:00 a.m. - 9:45 a.m. Thursday 10:15 a.m. - 12:00 p.m.
SC-003 to SC-008 Meet with Corptax! (NEW)	See session details for SC-003 to SC-008 Meet with Corptax! (NEW)

## SC-001 Maximize Your Corptax Support Tools

Corptax has resources to help guide you on your tax journey. See how entering Corptax Support cases can provide assistance. From Help topics to videos, Corptax has what you need to succeed. Take part in exploring the support tools in Corptax and Corptax Connect.

### Objectives:

- Identify and find support tools
- Locate videos in Corptax Help and Corptax Connect
- Navigate Corptax Connect

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<b>Day &amp; Time:</b>	Monday 3:45 p.m. - 4:45 p.m. Thursday 1:45 p.m. - 2:45 p.m.
<b>Category:</b>	Support & Consult
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	SC-001
<b>Duration:</b>	1 Hour
<b>CPE Credit:</b>	1
<b>Interaction Level:</b>	Lecture
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## SC-002 Tax Transformation Workshop

The Tax Transformation Workshop is a networking hub—a concentration of experts ready to answer your questions. Seek advice specific to your environment that has you stumped, explore new ways to automate, see a product demo, and learn about the many client services we offer. Put time in your schedule to seek assistance or relax and enjoy a snack in the Workshop Cafe as often as you like.

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<b>Day &amp; Time:</b>	Monday 10:15 a.m. - 12:00 p.m. Monday 1:30 p.m. - 3:15 p.m. Monday 3:45 p.m. - 5:30 p.m. Tuesday 8:00 a.m. - 9:45 a.m. Tuesday 10:15 a.m. - 12:00 p.m. Tuesday 1:30 p.m. - 3:15 p.m. Tuesday 3:45 p.m. - 5:30 p.m. Wednesday 8:00 a.m. - 9:45 a.m. Wednesday 10:15 a.m. - 12:00 p.m. Wednesday 1:30 p.m. - 3:15 p.m. Wednesday 3:45 p.m. - 5:30 p.m. Thursday 8:00 a.m. - 9:45 a.m. Thursday 10:15 a.m. - 12:00 p.m.
<b>Category:</b>	Support & Consult
<b>Skill Level:</b>	Overview
<b>Session ID:</b>	SC-002
<b>Duration:</b>	1 Hour 45 Minutes
<b>CPE Credit:</b>	0
<b>Interaction Level:</b>	Interactive
<b>Subject Area:</b>	Computer Software & Applications
<b>Prerequisite:</b>	None
<b>Advanced Prep:</b>	None

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## SC-003 to SC-008 Meet with Corptax! (NEW)

Book your focused time with us to discuss the topic of the hour. We will have resources to go over questions that you have, provide tips, tricks, and tools of the trade for the topic. Bring your questions and scenarios and run through with us what you are trying to achieve. We will structure the time to go through the topic, provide feedback on your questions, and also spend some time discussing making processes around these topics more efficient and effective.

### Objectives:

- Share your processes and questions around specific product topics and functional areas
- Discuss methods for process improvement
- Engage in the opportunity to also discuss the processes used by your peers

<b>Category:</b>	Support & Consult	<b>Interaction Level:</b>	Interactive
<b>Skill Level:</b>	Overview	<b>Subject Area:</b>	Computer Software & Applications
<b>Session ID:</b>	SC-003 to SC-008	<b>Prerequisite:</b>	None
<b>Duration:</b>	1 Hour	<b>Advanced Prep:</b>	None
<b>CPE Credit:</b>	1		

### Meet with Corptax! Sessions

Session Name	Day and Time
SC-003 Meet with Corptax! All Things Amended (NEW)	Monday 3:45 p.m. - 4:45 p.m. Wednesday 10:15 a.m. - 11:15 a.m.
SC-004 Meet with Corptax! Finding Your Way Through Corptax Web (NEW)	Tuesday 10:15 a.m. - 11:15 a.m. Thursday 10:15 a.m. - 11:15 a.m.
SC-005 Meet with Corptax! Data Management Using Corptax Office & POV (NEW)	Tuesday 8:00 a.m. - 9:00 a.m. Tuesday 1:30 p.m. - 2:30 p.m.
SC-006 Meet with Corptax! Amount Import & Data Entry (NEW)	Monday 10:15 a.m. - 11:15 a.m. Wednesday 3:45 p.m. - 4:45 p.m.
SC-007 Meet with Corptax! Automated Adjustments (NEW)	Monday 1:30 p.m. - 2:30 p.m. Wednesday 1:30 p.m. - 2:30 p.m.
SC-008 Meet with Corptax! Data Mining Using Query (NEW)	Wednesday 8:00 a.m. - 9:00 a.m. Thursday 8:00 a.m. - 9:00 a.m.

## 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 conference sessions, but please check the training details in this document for the official amount of CPE credits for each session.

Corptax LLC 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.learningmarket.org](http://www.learningmarket.org).

NASBA National Registry of CPE Sponsors – Sponsor License Number 108611

Texas State Board of Public Accountancy – Sponsor Number 009498

In accordance with NASBA standards, course evaluations will be distributed at the end of the event.

To register, visit [corptaxconnect.com](https://corptaxconnect.com).

