

Track	Skill Level	Session Name (* Denotes Hands-on)	Session Description
Accounting for Income Taxes	Overview	AIT-101-24 AIT Overview: Revolutionize Your Provision Process - NEW	Embark on a journey to streamline, standardize, and automate your provision process. In this overview of the Accounting for Income Taxes (AIT) product, learn how cutting-edge technologies can propel your provision process to new heights.
Accounting for Income Taxes	Intermediate	AIT-201-24* AIT: Exploring Setup and Data Management - NEW	Go in-depth and examine how you can use your existing Corptax infrastructure to set up the Corptax Accounting for Income Tax (AIT) product. Explore both new features and current functionality as it relates to managing your AIT data.
Accounting for Income Taxes	Intermediate	AIT-202-24* AIT: Exploring Calculations - NEW	Discover how the Corptax Accounting for Income Taxes (AIT) calculation can elevate and automate your provision process to an unparalleled level. With its amazingly quick, rules-based calculation and a seamless return to provision, you never have to worry about the accuracy of your provision numbers again!
Accounting for Income Taxes	Intermediate	AIT-203-24* AIT: Exploring Reporting - NEW	Evaluate how Corptax Accounting for Income Taxes (AIT) reporting will give a boost to your provision process. Explore the new functionality with AIT reports and how they can help identify trends and associated risks.
Administration	Intermediate	ADMIN-201-24 Manage Entities using Corptax Entity Management	Explore the fundamental concepts of the Entity Management product in Corptax, including entity properties, entity groups, and ownership. Distinguish between standard functionality and the enhanced features of the Corptax Entity Management product. Discuss security considerations and strategies for efficiently managing entity data within Corptax.
Administration	Intermediate	ADMIN-202-24* Enhance your Troubleshooting Techniques	Explore forensic techniques you can apply to troubleshooting Corptax issues. Emphasis will be on developing the skills necessary to investigate, analyze, and resolve software-related problems.
Administration	Intermediate	ADMIN-203-24* Leverage Corptax Security to Streamline Annual Maintenance	Delve into the relationship between Corptax Security features and the annual software maintenance process. See practical demonstrations and get hands-on experience with case studies focused on security features that optimize maintenance, minimize disruptions, and enhance your overall system.
Administration	Intermediate	ADMIN-204-24 Managing Rollovers in Corptax - NEW	Examine the rollover processes for enterprises, as well as the Calendar and Provision products. Focus on strategic planning, execution, and optimization for transitioning from one system year to the next. Discuss how a systematic approach minimizes downtime, mitigates risk, and ensures continuity of operations.

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Administration	Advanced	ADMIN-301-24 Tax Software Maintenance: Collaborative Strategies for Corptax Administrators and IT Teams - NEW	As a Corptax administrator you might be responsible for communicating with IT teams to ensure the integrity and performance of the Corptax software. Join this session to learn how to effectively collaborate with your IT team while gaining essential skills and strategies needed to enhance maintenance processes, improve Corptax performance, and strengthen security measures within your organization.
Automation and Data Management	Overview	ADM-001-24 Peer Forum: Corptax Automation Tools - NEW	Discuss Corptax automation tools and how to leverage them to enhance your compliance tax processes. Share knowledge, collaborate, and exchange insights into how Corptax Automated Adjustments, BOTS, Queries, and other tools are driving process efficiency.
Automation and Data Management	Overview	ADM-002-24 Peer Forum: Data Management Tools - NEW	Gain an overview of Corptax data management tools and discover effective strategies for leveraging them to import and export data to and from Corptax. Share knowledge, collaborate, and exchange insights on how Corptax Data Management, Office and other tools are driving efficiency in your processes.
Automation and Data Management	Basic	ADM-101-24* Essentials of Corptax Office	Explore Corptax Office and understand its functionalities. Learn how Corptax Office interacts with Excel spreadsheets to facilitate the submission or retrieval of data to and from Corptax, thereby reducing risks and enhancing the accuracy of your data entry procedures.
Automation and Data Management	Basic	ADM-102-24* Introduction to Query Tools in Corptax - NEW	Discover essential skills to effectively create and use queries. Through a combination of theoretical concepts and hands-on exercises, you'll learn how to harness the power of query tools to extract valuable insights from your tax data.
Automation and Data Management	Intermediate	ADM-201-24* Mastering Corptax Automated Adjustments: Streamline Your Tax Processes for Enhanced Accuracy	Get hands-on experience in setting up and processing Corptax Automated Adjustments and see how they can empower you to optimize efficiency and minimize errors in your tax workflow.
Automation and Data Management	Intermediate	ADM-202-24* Mastering Data Import in Corptax	Embark on a guided journey through the data import process within Corptax. Develop a comprehensive understanding of the complete process and acquire practical skills for creating and updating packages and connectors as well as resolving rejects.
Automation and Data Management	Intermediate	ADM-203-24 Boost Efficiency with Advanced Corptax Query Features - NEW	Explore the advanced features of Corptax queries to unlock their full potential for data retrieval and analysis. Whether you are new to advanced querying or seeking to enhance your skills, this course will provide you with the valuable insights and practical techniques needed to excel in your role.

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Automation and Data Management	Intermediate	ADM-204-24* Leveraging Advanced Corptax Office Features for Your Corptax Data	Take your Corptax Office skills to the next level by mastering advanced methods for extracting Corptax data. Gain expertise in utilizing POVs and Pivot tables to manipulate data effectively. Additionally, discover best practices followed by fellow Corptax users to enhance your proficiency.
Automation and Data Management	Intermediate	ADM-205-24 Optimizing Tax Processes with Corptax BOTS	Corptax BOTS can help you streamline your manual processes in Corptax. Explore how automation with Corptax BOTS frees up resources previously spent on repetitive tasks, empowering professionals to focus on value-added activities.
Automation and Data Management	Basic	BC-104-24* Corptax Office Bootcamp: Excel Integration Masterclass - NEW	Flow through the advanced functionalities of the Corptax Office Excel add-in. From data mapping to submission, learn how to enhance Excel's capabilities with Corptax to streamline your tax data processes.
Compliance	Basic	BC-101-24* U.S. Compliance Bootcamp	Beginners will learn essential components of the setup process, how to review data, and how to produce returns and reports required for your federal filings. You will also discover ways to access assistance when you need it.
Compliance	Intermediate	BC-201-24* Corptax e-File Bootcamp - NEW	Explore the e-file process through practical experience in setting up and processing both Federal and State returns. Additionally, learn how to interpret and resolve e-file errors effectively.
Compliance	Basic	CEF-101-24 The Essentials of e-File Setup & Processing - NEW	Experience a comprehensive overview of the e-file process, highlighting best practices for setting up, processing, and transmitting your tax packages. Collaborate with peers to share insights and optimize your e-filing approach.
Compliance	Intermediate	CEF-201-24* Fundamentals of e-File Package Processing - NEW	Take a hands-on approach to performing the necessary steps to finalize your e-file packages. Additionally, learn how to effectively use Corptax Help resources to guide you through the e-file processing journey.
Compliance	Intermediate	CEF-202-24* Simplified State Tax E-Filing with Corptax - NEW	Gain hands-on experience and practical insights to ensure accurate and efficient state e-filings. Learn to navigate potential challenges and use Corptax features and resources effectively to streamline your e-filing experience.
Compliance	Intermediate	CEF-203-24 Mastering e-File Expertise: Insights and Tools from Corptax Professionals	Gain valuable insights from experienced Corptax professionals. Leave with the tools and knowledge required to effortlessly resolve e-file errors.
Compliance	Overview	PT-001-24 Peer Forum: Passthrough - NEW	Connect with your peers to gain valuable insight, best practices, and learn how they use Corptax for their passthrough needs.

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Compliance	Basic	PT-101-24* Painless Pass-Through Returns - NEW	Get familiar with the setup of pass-through entities and see how Corptax efficiently generates your required filings.
Compliance	Basic	PT-102-24* Control the Chaos of Schedules K-2 and K-3 - NEW	Learn how to set up the Schedule K-2 and K-3 for proper data flow and to troubleshoot common e-file errors related to these schedules.
Compliance	Overview	USC-001-24 Peer Forum: Federal Compliance and e-File	Work together with your colleagues to uncover effective strategies for completing Federal domestic tax filings successfully. Explore valuable insights shared by fellow users.
Compliance	Overview	USC-002-24 Peer Forum: State Compliance and e-File - NEW	Collaborate with your peers to uncover efficient strategies for successfully completing state tax filings. Explore valuable insights shared by fellow users to enhance your approach.
Compliance	Overview	USC-003-24* Corptax Calculation Review and Collaboration - NEW	Dive into the exciting new features of Corptax! Learn how to leverage calculation review tools, comparative reporting capabilities, and a user-friendly interface to save time, ensure accuracy, and foster seamless collaboration throughout the tax preparation process.
Compliance	Basic	USC-101-24* Corptax 101: Essentials for Achieving Success	Beginners will gain expertise in navigating the system, generating tax returns, and accessing assistance precisely when you need it.
Compliance	Basic	USC-102-24* Proficiencies for State Compliance	Familiarize yourself with the fundamentals of managing state apportionment data and tracing it back to its origin. Produce returns for single or combined/consolidated states. Enhance efficiency through the post-amounts process.
Compliance	Intermediate	USC-201-24 Efficient Habits for Federal Compliance	Discover strategies and techniques to streamline your federal compliance procedures. Exchange insights with colleagues to advance to the next level of efficiency.
Compliance	Intermediate	USC-202-24 Supporting Schedules for the Federal Return	Learn valuable knowledge about supporting schedules for the 1120 return and how to process them efficiently.
Compliance	Intermediate	USC-203-24* Understanding Form 4626 in Corptax - NEW	Learn how to leverage your existing data to produce Form 4626.
Compliance	Intermediate	USC-204-24 Strategies and Techniques for State Compliance	Let our experts guide you through the nuances of intricate state requirements. Acquire optimal methods for handling the state filing process.
Compliance	Intermediate	USC-205-24 Prepare for your Audit with Ease	Be a step ahead when faced with an audit by having all your supporting documentation ready and learn how and when to grant auditor access to Corptax.
Compliance	Intermediate	USC-206-24 Short-Period Filings: Tips and Tricks	Learn about all the things you should consider to properly complete and e-file your short-period returns, including which year of tax forms to use and how to get second period data to flow correctly to the form.

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Executive	Overview	EXEC-001-24 Executive View of Corptax - NEW	This executive level panel discussion will show you how to use Corptax to its fullest potential. We will show you the solutions we provide across the entire tax life cycle! From Provision and Compliance to Reporting and Analytics, we'll demonstrate how the Corptax single solution can strengthen your tax department.
Executive	Overview	EXEC-002-24 Shaping the Future of Corptax - NEW	Get an exclusive outlook on the future of Corptax, tailored for leaders like you! Gain insights into the long-term viability and growth of the Corptax suite of products and its profound benefits for your organization. Engage directly with the Corptax team to share your feedback and strategic vision, guiding the trajectory of our product's evolution.
Executive	Overview	EXEC-003-24 Taking Control of Your Tax Data - NEW	Unlock the power of your tax data and transform it into a valuable asset for your organization. Discover best practices for tax data management, including data governance, data quality, and data security, to make informed business decisions, enhance compliance, and mitigate risks.
Executive	Overview	EXEC-004-24 Pillar Two: Next Steps - NEW	Now that Pillar Two is effective and operational, learn how to seamlessly incorporate it into your financial close and prepare for compliance. Listen to best practice recommendations and real-life examples of how your peers have embraced Pillar Two and made it an integral part of their process.
Executive	Overview	EXEC-005-24 Corptax as a Problem Solver - NEW	Hear how Corptax resolves challenges faced by executives managing complex tax departments. Whether you're grappling with compliance issues, optimizing tax processes, staff turnover, or seeking insights for strategic decision-making, Corptax has you covered.
Executive	Overview	EXEC-006-24 Navigating Tax Uncertainty: Emerging Trends - NEW	With developments in AI, changes in tax disclosure requirements and evolving tax law updates, tax departments find themselves in the challenging position of planning for changes before they fully materialize. Delve into the realm of emerging tax trends and discover how Corptax is strategically preparing to navigate them.
General	Overview	GS-001-24 General Session	Come help us kick-off CONNECT 2024! Listen to CSC Corptax President Ted Pacheco and management discuss newly released and future product plans. Hear inspirational peer success stories from Tax Transformer Awards finalists and discover who wins the esteemed title for 2024!
General	Overview	GS-002-24 Get the Most Out of CONNECT - NEW	Find out what makes CONNECT the best source for tax, tools, and technology information that will move your whole department forward. Join Corptax staff as they map out a winning conference strategy for gaining the insights, product information, and industry contacts you need. Whether first-time attendee or returning alum, an overview of the agenda, curriculum, and networking events makes for a fulfilling professional development experience.

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General	Overview	GS-003-24 Meet Corptax! - NEW	Join us for an engaging session where you'll have the opportunity to meet the minds behind Corptax on a personal and professional level. In this relaxed and interactive setting, our team members will share insightful anecdotes and life experiences that have shaped their journey and contributed to their success at Corptax. But this session isn't just about listening – it's about engaging with our team members directly. Come with your burning questions that you've always wanted to ask!
General	Overview	GS-004-24 Facilitated Networking Table Talks - NEW	Engage in stimulating conversations and forge valuable connections at our facilitated networking table talks. This is your chance to meet fellow attendees and delve into discussions about current business challenges, innovative solutions, and industry trends. Corptax staff will facilitate small group discussions, providing structure and guidance to ensure a productive and intellectually stimulating exchange. When you register, select from these topics: <ul style="list-style-type: none"> • Federal Credits including Form 3800 • Preparing the Provision Payable Reconciliation, Journal Entries, and Disclosures • Explore the Interim Provision Workpapers • International Diagnostic Reports & Reconciliation Tools • Share Tips and Tricks for Preparing Form 5471 and 8858 • Pass-Through - Sharing Solutions • Insurance Round Table • State Return Processing • Federal Credits including Form 3800
General	Overview	GS-005-24 Corptax: The Solution for All of Your Tax Needs - NEW	Discover the transformative power of using a single solution, database driven software to optimize your tax department. Delve into the advantages and opportunities that arise from harnessing a common database, ensuring a unified source of truth throughout the tax lifecycle. Gain an understanding of the feature-rich products and tools available in Corptax, equipping you with the knowledge to streamline your tax-related tasks effortlessly.
General	Overview	GS-006-24 Product Update: Unveiling the Future of Corptax	Discover the exciting enhancements planned for 2025 that will revolutionize your tax processes. Find out how they are designed to elevate efficiency, accuracy, and the overall user experience. Don't miss this opportunity to stay informed of changes and contribute your feedback to help drive the continuous improvement of our products.

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General	Overview	GS-007-24 Career Strategy Discussion: Women Shaping the Future of Tax Technology - NEW	Support leading women in tax technology and explore how their insights and experiences are shaping the future of the industry. From innovative solutions to overcoming challenges, our panelists will share their journeys and inspire the next generation of women in tax technology. Help us celebrate, connect, and pave the way for a brighter future that empowers women to thrive in this dynamic field!
General	Overview	GS-008-24 Career Strategy Discussion: Building Your Professional Brand - NEW	Join this session, tailored to rising stars in their careers who are eager to learn how to effectively promote themselves and build their professional brand. Engage in meaningful conversations, exchange insights, and forge valuable connections with peers and mentors who can support you on your journey. Our panelists will provide guidance on personal branding strategies, elevator pitches, and networking etiquette to help you make a lasting impression in any professional setting.
General	Overview	GS-009-24 Career Strategy Discussion: Helping Leaders Navigate the Remote Landscape - NEW	Calling all leaders of remote work environments! Join this session to connect with like-minded professionals facing similar challenges and opportunities. Share best practices, exchange strategies, and learn from the experiences of fellow remote leaders as we navigate the complexities of remote team management together. Whether you're a seasoned remote leader or new to managing remote teams, this event offers a unique opportunity to gain fresh perspectives, expand your network, and discover innovative approaches to leading in a virtual world.
Global Reporting	Intermediate	BC-203-24* Global Reporting Bootcamp - NEW	Learn how the CSC Corptax Global Minimum Tax solution helps you effectively navigate intricate global reporting requirements and stay ahead in today's dynamic business environment.
Global Reporting	Overview	GR-001-24 Understanding CbC Reporting in Corptax	Gain a high-level understanding of how CbC data flows for reporting purposes. Gain insights into tracing data from its origin to its utilization in reporting and analytics to it automatically being included in the Safe Harbor calculation.
Global Reporting	Intermediate	GR-201-24* Preparing for the GloBE Information Return (GIR)	Learn the skills necessary to harness existing Corptax data to simplify your BEPS reporting obligations. Delve into how you can use the OECD schema to satisfy your reporting requirements in the US and other jurisdictions.
Global Reporting	Intermediate	GR-202-24* CSC Corptax Global Minimum Tax: A Model for Success	Learn how Corptax helps you navigate through the GMT requirements confusion by using the CSC Corptax Global Minimum Tax solution. Learn techniques to maintain data accuracy and consistency, mitigate compliance risks, and enhance trustworthiness.
Global Reporting	Intermediate	GR-203-24 Preparing for the GloBE Information Return (GIR) - NEW	Join our Corptax experts to get the latest updates on how Corptax plans to handle the GIR reporting requirement.

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Insurance	Overview	INS-001-24 Peer Forum: Insurance - NEW	Get together with your industry peers to discuss and discover how they use Corptax for all of their insurance requirements.
Insurance	Overview	INS-002-24 Best Practices for Insurance Filings - NEW	Learn from Corptax professionals and your peers on how to best use Corptax Insurance to its fullest potential.
Insurance	Overview	INS-003-24 Exploring STAT-based Insurance Provisions: Contrasting P&C and Life Companies - NEW	Join an in-depth examination of STAT-based insurance provisions for P&C and Life insurance companies. Delve into the unique characteristics of each company type and how Corptax Provision uses data to provide you with Current/Deferred taxes, SSAP-101 calculations, and more! Whether you're in P&C or Life insurance, this session will provide valuable insights into Corptax Provision and its role in the insurance arena.
Insurance	Intermediate	INS-201-24* Mastering Mixed Group Return e-Filing	Enhance efficiencies by implementing streamlined procedures to expediate your mixed group e-file process. Learn protocols that develop a system to minimize errors and ensure the accuracy of your electronic return.
International	Basic	BC-102-24* International Compliance Bootcamp for Forms 5471 & 8858	Gain practical experience in preparing and entering data into Corptax to generate Forms 5471 and 8858. Learn how to navigate the software effectively, understand how data is stored, and utilize available resources to guide you through the tax preparation process.
International	Intermediate	BC-202-24* International Compliance Bootcamp for Form 1118 - NEW	Walk through the step-by-step process of preparing Form 1118 using Corptax. Gain insight into how to choose the appropriate methods for categorizing domestic data, accurately entering data related to domestic entities, and processing the international calculations required for Form 1118. Additionally, explore the resources and tools within Corptax that you can use to analyze form data.
International	Overview	INT-001-24 Peer Forum: International	Gain insights into international tax topics and the evolving role of Corptax in addressing complex international tax compliance challenges.
International	Basic	INT-101-24 Elevating Your International Tax Process Using Corptax	Gain Corptax knowledge and skills to optimize your international tax processes. Explore tips and tricks to enhance reviewing, reconciling, and managing international tax data. Learn from industry peers into how they are leveraging Corptax to streamline and optimize their international processes.
International	Basic	INT-102-24* Corptax Basics for International Tax Processes - NEW	Gain hands-on experience with the basic steps required to generate an international return in Corptax.
International	Intermediate	INT-201-24* Processing Automated Forms 5471 and 8858 in Corptax - NEW	Obtain a comprehensive overview of the process for completing the Automated Forms 5471 & 8858. This session will highlight the optimal use of reports and diagnostics within Corptax to effectively review, reconcile, and finalize the forms.

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International	Intermediate	INT-202-24* Processing Automated Forms 1118 and 8993 in Corptax	Gain insights into the high-level process of completing Forms 1118 and 8993. Discover optimal strategies for utilizing reports and diagnostics in Corptax to effectively review and reconcile these forms.
International	Intermediate	INT-203-24* Understanding Form 8990 and 8992 in Corptax	Dive into the specifics of amounts reported on both Form 8990 and 8992. Walk through practical examples of utilizing International reports and International Diagnostics to review and reconcile the displayed amounts on these forms.
International	Intermediate	INT-204-24* Utilizing Corptax for Historical Earnings and Profits Calculations	Enhance your Corptax skills for managing and calculating historical earnings and profits effectively and accurately.
International	Intermediate	INT-205-24 Calculating Lookthru Payments and Exploring Corptax International Features	Learn how to compute lookthru payments, focusing on interest, rents, royalty, and dividend lookthru payments. Explore lookthru ordering, related interest rules, potential Related Person Interest (RPI) offsets related to Section 163(j), and the intricacies of dividend distribution. With Corptax International and your relevant sourcing information in hand, you'll be able to handle the international calculations seamlessly!
International	Intermediate	INT-206-24 International Planning and Provision	Enhance your Corptax International skills to assess the impact of tax law changes, create comparative planning scenarios, and understand the data requirements for meaningful tax planning and provision scenarios. Explore real-world examples that demonstrate how Corptax streamlines your international tax planning and provision processes.
International	Intermediate	INT-207-24* Maximizing Your International Data Utilization with Corptax Office - NEW	Get a comprehensive understanding of how to leverage Corptax Office, POVs (Point of View), and analytical tools effectively for handling international tax forms. Gain hands-on experience with Corptax's specialized features to streamline the preparation and review of international tax forms.
Product Demo	Overview	PD-002-24 Demo and Discuss: Corptax International Compliance	Join this product demonstration to understand how to use CSC Corptax® International Compliance to take charge of reporting on global business activities. Learn ways to streamline your process to address all U.S. international reporting requirements including: <ul style="list-style-type: none"> • Tracking Historical E&P • Calculating Subpart F, GILTI, FDII, 163(j), and FTC • Populating the 5471 and related schedules and forms 8990, 8992, 8993, & 1118 • Analyze results using diagnostic reports and other analytics tools
Product Demo	Overview	PD-003-24 Demo and Discuss: Corptax Global Provision	Join this production demonstration to walk through Corptax as a single solution and see how you can get your provision out of Excel. From managing entities, to provision, to return to provision, to accessing your data for planning and analytics - discover new tips to save time, reduce risk, and automate RTP.

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Product Demo	Overview	PD-004-24 Demo and Discuss: Corptax Global Minimum Tax	Join this product demonstration to see how Corptax helps you plan for Global Minimum Tax (GMT) and the U.S. Corporate Alternative Minimum Tax (CAMT). Discover how to use the Corptax GMT risk analysis and AMT modeling solution to help minimize the risk related to the Model GloBE rules.
Product Demo	Overview	PD-005-24 Demo and Discuss: Corptax Accounting for Income Taxes	Join this Corptax AIT product demonstration to walk through the enhancements to our single solution as they relate to provision reporting. Discover the possibility of taking your provision to the next level including global access from any device at any time, rule-based fast calculations, granular flexible and configurable reporting with drill through to details, automated return to provision, and more.
Product Demo	Overview	PD-006-24 Demo and Discuss: Corptax Data Management Solutions - NEW	Discover how you can create more automation in your tax lifecycle. Some of the tools shown in this product demonstration include: <ul style="list-style-type: none"> • Corptax Office • Corptax Connector for Alteryx • Corptax Web Services API • Corptax DocManager Learn how these tools can help streamline your process and improve overall productivity.
Product Demo	Overview	PD-007-24 Demo and Discuss: Corptax Data Visualization Solutions - NEW	Explore the automation tools that connect you with your Corptax data to present it in a clear and understandable manner. Some of the tools shown in this product demonstration include: <ul style="list-style-type: none"> • Corptax Connector for Alteryx • Corptax Connector for Microsoft Power BI • Corptax Office/Point of View (POV) • Corptax ODBC Learn how these tools can help you transform your data for modeling and planning purposes.
Product Demo	Overview	PD-008-24 Demo and Discuss: Corptax Process Automation Solutions - NEW	Join this product demonstration to see how Corptax can remove manual labor and repetition from your daily life! Some of the tools shown in this demo include: <ul style="list-style-type: none"> • Cart • Auto M's • Corptax BOTS • Corptax DocManager • Corptax Data Exchange Manager

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Provision	Basic	BC-103-24* Provision Bootcamp	Gain hands-on experience to help optimize your provision process. Navigate through the software and learn how to access the tools that will assist you in your provision journey. Get familiar with key data profiles, learn how to enter provision data, and discover the reports that will help make your federal and state provision be the best it can be!
Provision	Overview	PR-001-24 Peer Forum: Provision	Interact with your peers to discover helpful hints, best practices, and how they use Corptax for their provision process.
Provision	Basic	PR-101-24 Corptax Provision: Tips and Tricks	Listen to insights from our Corptax Provision experts and discover valuable strategies, techniques, and best practices to sharpen how you use Corptax to prepare provision.
Provision	Intermediate	PR-201-24 Corptax Provision: Elevate Your Process	Take your provision process to the next level by discovering workpapers you might not be aware of, then learn how to incorporate them into your current process to amplify the effectiveness of your provision calculation.
Provision	Intermediate	PR-202-24 Become Proficient with State Provision - NEW	Ensure you're prepared for the transition from a blended to detailed calculation for your state provision ahead of the new FASB changes. Stay ahead of the curve by joining our informative session, where we'll delve into strategies and best practices for smoothly transitioning using Corptax Provision.
Provision	Intermediate	PR-203-24 Streamline Your Year-End Provision	Prepare for year-end provision ahead of time by completing your preparation checklist. Flow through the provision rollover process, provide tips for tying out beginning balances and RTP, and explore additional steps you can take in advance to ensure a smooth close. Whether you're a seasoned professional or new to year-end provision, this session will equip you with the knowledge and tools to effectively manage the year-end process and minimize last-minute challenges.
Provision	Intermediate	PR-204-24 Maximize the Potential of Your Provision Data	Discover powerful provision reporting tools and techniques such as Corptax Office, Power BI, and Alteryx. Develop the ability to extract meaningful insights from provision data, enabling you to make informed decisions and recommendations to stakeholders.
Provision	Intermediate	PR-205-24* Corptax Office and Provision: The Perfect Combination!	See how Corptax Office saves time and energy in your provision process. Retrieve Corptax Provision data for analysis using a real-time refreshable connection, then save manual entry time by posting that data back to Corptax.
Reporting and Analytics	Intermediate	BC-204-24* Advanced Excel Bootcamp - NEW	Harness the full potential of Excel's latest features. Engage with dynamic arrays, LAMBDA functions, and advanced data types to transform your data analysis and reporting techniques.
Reporting and Analytics	Intermediate	BC-205-24* Alteryx Bootcamp - NEW	An immersive experience into the world of Alteryx, you'll walk through everything from basic interface navigation to the creation of intricate workflows, enabling you to harness the full power of Alteryx for your data.

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Reporting and Analytics	Overview	RA-001-24 Peer Forum: Reporting and Analytics	Engage with industry peers to discover innovative uses of data sources and reporting tools like Power BI, Alteryx, and Connector. Enjoy a platform to exchange success stories, discuss challenges, and learn from the collective experience of professionals in the field. Enhance your understanding of reporting tools and analytics to drive your organization's decision-making processes.
Reporting and Analytics	Basic	RA-101-24 Corptax Web and Reporting...the Perfect Combination!	Discover the full potential of Corptax Web in this insightful session on enhancing your reporting capabilities. Learn to effectively configure reports to meet organizational needs and utilize the tool to its fullest extent for reviewing and analyzing data.
Reporting and Analytics	Basic	RA-102-24* Excel Mastery: Supercharge Your Tax and Operations with Advanced Formulas	Delve into advanced Excel formulas and techniques aimed at enhancing tax processes and operational efficiencies. This session is designed for those who have not attended the Bootcamp, focusing on empowering participants with the skills to utilize features such as XLOOKUP, XMATCH, and dynamic arrays. Enhance your Excel proficiency and learn to streamline workflows and improve data analysis.
Reporting and Analytics	Basic	RA-103-24 Introduction to Power Automate and Microsoft 365 - NEW	Delve into the powerful capabilities of Power Automate and Microsoft 365 in this informative session. Learn how to automate routine tasks, enhance collaboration, and streamline your workflow using the comprehensive features of Microsoft 365 and the automation potential of Power Automate.
Reporting and Analytics	Intermediate	RA-201-24 Best Practices: What ETL to use in what situation - NEW	Hear a practical guide to choosing the right ETL tools for various data scenarios. Explore the integration capabilities of Power BI, Excel, Power Query, and Alteryx, and learn to match each tool's strengths to their specific needs for optimal data processing and reporting.
Reporting and Analytics	Intermediate	RA-202-24 Powering Up: Intermediate/Advanced Power Automate and Microsoft 365 - NEW	Build on your foundational knowledge of Microsoft 365 and Power Automate. Discover deeper functionalities and develop the ability to craft complex automation workflows that help redefine efficiency in your digital work processes.
Reporting and Analytics	Intermediate	RA-203-24 Rate Rec and Footnote Tool: Precision in Tax Rate Reconciliation - NEW	Gain a comprehensive understanding of the Rate Reconciliation Footnote Analytic Package. Learn how to use the tool for precise and consistent footnote presentation, multi-year ETR and tax expense analysis, and efficient audit support.
Reporting and Analytics	Advanced	RA-301-24* Alteryx for the Advanced User - NEW	Take a deep dive into the advanced features of Alteryx, designed for professionals who are ready to enhance their data manipulation and analytical skills. Discover intricate functionalities, workflow optimization, and the development of complex analytical processes.

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Reporting and Analytics	Advanced	RA-302-24* Power BI for the Advanced User - NEW	Advance your data visualization capabilities in this dedicated session for Power BI users. Learn how to leverage advanced features for creating more insightful and impactful dashboards and reports. Ideal for those looking to deepen their understanding of Power BI's robust analytics tools.
Reporting and Analytics	Advanced	RA-303-24* Power Query for the Advanced User	Take your Power Query skills to the next level. Explore the nuances of data transformation and learn how to utilize Power Query to streamline your data processes, improve efficiency, and unveil deep insights from your data.
Transformation Theater	Overview	TT-001-24 Unlock the Potential of AIT in Your Provision Process - NEW	Review enhanced reporting functionality, the AIT Dashboard and other convenient enhancements that are designed to make your provision process smooth and efficient.
Transformation Theater	Overview	TT-002-24 Corptax Web Features: View, Collaboration and Home Enhancements - NEW	Explore new Corptax Web features including View, Collaboration, and enhancements to the Home page. These new enhancements expand the ability to review, collaborate with teammates, and access what's important to you.
Transformation Theater	Overview	TT-003-24 Using Pro-Check to Fully Leverage Your Data and Software - NEW	Keeping up in today's tax world leaves little time to revamp processes or refine analytics. A Process Review and Optimization Check (PRO-Check) helps you fully leverage your data and get the most out of the software you license.
Transformation Theater	Overview	TT-004-24 How and When to Use Alteryx, Power BI, and Corptax Office - NEW	Alteryx, Power BI, and Corptax Office are all powerful automation tools that can transform your data for planning, modeling, and endless other possibilities. Explore the best way to leverage each of these unique solutions to meet your needs.
Transformation Theater	Overview	TT-005-24 Review Federal Data Using Corptax Administrative Reports - NEW	Create a consistent process for reviewing data by using the reports Corptax provides. Start with the out-of-the-box whitepaper reports, then create customized versions that can include more accounts, details, etc. to meet your review presentation needs.
Transformation Theater	Overview	TT-006-24 International Setup Considerations - NEW	Get a head start on your International compliance process. Explore best practices for setting up Corptax profile information and International processing steps.
Transformation Theater	Overview	TT-007-24 Posting Amounts for Pass-Through, Provision, and Amended Returns - NEW	Explore the post amounts process and learn how to leverage this posted data to efficiently process Pass-Through, Provision, and Amended Returns.
Transformation Theater	Overview	TT-008-24 Pillar Two Automation Using the GMT Dashboard - NEW	As reporting requirements around the world evolve, so does Corptax GMT. Learn about this complete global solution for Pillar Two and QDMTT obligations.

Track	Skill Level	Session Name (* Denotes Hands-on)	Session Description
Transformation Theater	Overview	TT-009-24 Get the Most From Provision Workpapers and Tools - NEW	The NOL Posting, Charitable Contribution, and Exchange Rate Posting tools come standard with Corptax Provision but are not always utilized. Obtain a comprehensive overview of these tools and how they can help streamline your process.
Transformation Station	Overview	TS-001-24 Transformation Station	<p>Make a Date to Automate!</p> <p>Discover better ways to get, manage, and use your tax data. Meet personally with Corptax staff to hone efficiencies and see new software features, live.</p> <p>A great experience awaits:</p> <ul style="list-style-type: none"> • Attend a variety of product demos—and see solutions slated for release • Consult with specialists on best-practice planning for new tax laws • Explore a variety of loan-staff and process optimization options • Relax and recharge with peers <p>Book Time in Transformation Station!</p> <p>Schedule your Transformation Station visit when you register for CONNECT 2024. We'll connect you with the right people when you arrive. Or drop by on the fly during the conference, and we'll get you assistance on the spot.</p> <p>Ensure you use Corptax to its fullest. Make Transformation Station a must-see stop!</p>
User Experience Lab	Overview	UX-001-24 Unveiling the Future of the Corptax User Experience - NEW	Participate in our user experience lab to preview the future of the Corptax User Experience. In this small group setting, you will be able to provide direct feedback to our team that will help drive the development of these features.
User Experience Lab	Overview	UX-001-24 Shape the Future of Corptax Accounting for Income Taxes (AIT) - NEW	Take part in our User Experience Lab to gain early access to the future of Corptax AIT. In this small group setting, we will gather your insights on your current workflows and challenges while showing you the plan for the next phase of AIT. This valuable feedback will be instrumental in shaping the future of the product.
User Experience Lab	Overview	UX-001-24 Corptax Analytic Tools - The Future is Bright! - NEW	We want to hear from you! During this User Experience Lab, we will discuss existing tools and solicit feedback that will help shape the future of analytics at Corptax. We will use this small group setting to better understand how analytics saves you time, reduces errors, and helps you make better decisions.

