































THOMSON REUTERS  
**SYNERGY**2019 **Workshop Schedule**

Time and length → **A - I - Day**  
 Workshop number → # Workshop Title **Speaker**  Hands-on class (Rows 1-5)

THURSDAY				FRIDAY				SATURDAY		
A	B	C	D	E	F	G	H	I		
9:30 a.m. - 10:20 a.m.	10:50 a.m. - 11:40 a.m.	1:00 p.m. - 2:40 p.m.	3:10 p.m. - 4:50 p.m.	9:30 a.m. - 11:10 a.m.	11:40 a.m. - 12:30 p.m.	1:50 p.m. - 2:40 p.m.	3:10 p.m. - 4:50 p.m.	08:30 a.m. - 10:10 a.m.		
50 Minutes	50 Minutes	100 Minutes	100 Minutes	100 Minutes	50 Minutes	50 Minutes	100 Minutes	100 Minutes		
1		Accounting Services Using Accounting CS PART 1 <b>TR</b> 	Accounting Services Using Accounting CS PART 2 <b>TR</b> 	1	Workpapers CS Essentials PART 1 <b>TR</b> 	Workpapers CS Essentials PART 2 <b>TR</b> 	Accounts Payable and Receivable Using Accounting CS PART 1 <b>TR</b> 	Accounts Payable and Receivable Using Accounting CS PART 2 <b>TR</b> 	1	
2		Preparing 1065, 1120, and 1040 Returns Using UltraTax CS PART 1 <b>TR</b> 	Preparing 1065, 1120, and 1040 Returns Using UltraTax CS PART 2 <b>TR</b> 	2	Financial Statements Formatting Using the Accounting CS Report Designer PART 1 <b>TR</b> 	Financial Statements Formatting Using the Accounting CS Report Designer PART 2 <b>TR</b> 	Financial Statements Formatting Using the Accounting CS Report Designer PART 1 <b>TR</b> 	Financial Statements Formatting Using the Accounting CS Report Designer PART 2 <b>TR</b> 	2	
3		Customizing Your Client Documents Within UltraTax CS PART 1 <b>TR</b> 	Customizing Your Client Documents Within UltraTax CS PART 2 <b>TR</b> 	3	Advance Your Keyword Search Skills and Techniques on Checkpoint <b>TR</b> 		Fixed Assets CS Essentials PART 1 <b>TR</b> 	Fixed Assets CS Essentials PART 2 <b>TR</b> 	3	Time-Saving Tips on Federal Tax Research Using Checkpoint <b>TR</b> 
4		Payroll Services Using Accounting CS PART 1 <b>TR</b> 	Payroll Services Using Accounting CS PART 2 <b>TR</b> 	4	Connecting Accounting CS and QuickBooks PART 1 <b>TR</b> 	Connecting Accounting CS and QuickBooks PART 2 <b>TR</b> 		Designing Payroll Reports and Layouts Using Accounting CS Payroll <b>TR</b> 	4	Designing Payroll Reports and Layouts Using Accounting CS Payroll <b>TR</b> 
5		Creating Custom Formats in Practice CS PART 1 <b>TR</b> 	Creating Custom Formats in Practice CS PART 2 <b>TR</b> 	5	Billing Using Practice CS PART 1 <b>TR</b> 	Billing Using Practice CS PART 2 <b>TR</b> 		Data Mine in UltraTax CS to Identify Advisory Opportunities <b>TR</b> 	5	Data Mine in UltraTax CS to Identify Advisory Opportunities <b>TR</b> 

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50 Minutes	50 Minutes	100 Minutes	100 Minutes	100 Minutes	50 Minutes	50 Minutes	100 Minutes	100 Minutes			
6	Proactive Management Tools for Accounting and Payroll Services Using Accounting CS <b>TR</b>	What's New in Accounting CS and Workpapers CS <b>TR</b>	Advanced Accounting Services Using Accounting CS <b>TR</b>	Preparing for the New Leases Standard (ASC 842) <b>TR</b>	6	Revenue from Contracts with Customers (ASC 606): Lessons Learned from Public Company Adoption <b>TR</b>	Proactive Management Tools for Accounting and Payroll Services Using Accounting CS <b>TR</b>	What's New in Accounting CS and Workpapers CS <b>TR</b>	Prepping for Year End Using Trial Balance Tools for Accounting CS and Workpapers CS <b>TR</b>	6	Advanced Accounting Services Using Accounting CS <b>TR</b>
7	Boost Efficiencies with Accounting CS Bank Feeds <b>TR</b>	Boost Efficiencies with Accounting CS Bank Feeds <b>TR</b>	Advanced Financial Statements Formatting Using the Accounting CS Report Designer <b>TR</b>	Creating and Sustaining Continuous Firm Improvement <b>Campbell</b>	7	Preparing for the Future: Transforming Your Firm <b>Sherrin</b>	Maximizing Accounting CS Integration with the CS Professional Suite <b>TR</b>	Boost Efficiencies with Accounting CS Bank Feeds <b>TR</b>	Trailblazing Women: Learning from Women Leading in Tax and Accounting. <b>TR</b>	7	Advanced Financial Statements Formatting Using the Accounting CS Report Designer <b>TR</b>
8	4 Ways to Effectively Leverage Social Media for Your Firm <b>TR</b>	Advanced Bookkeeping for Accounts Receivable and Accounts Payable Using Accounting CS <b>TR</b>	Taking Charge of Your Client's Accounting System <b>Seale and Wallpe</b>	Streamline Your Tax Workflow Using Workpapers CS <b>TR</b>	8	Connecting with Your Small Business Clients via Thomson Reuters OnBalance <b>TR</b>	Advanced Bookkeeping for Accounts Receivable and Accounts Payable Using Accounting CS <b>TR</b>	4 Ways to Effectively Leverage Social Media for Your Firm <b>TR</b>	Onvio Workpapers <b>TR</b>	8	Streamline Your Tax Workflow Using Workpapers CS <b>TR</b>
9	Streamlining Your Payroll Operations with Accounting CS <b>Fleming</b>	A New Approach to Payroll Strategy <b>TR</b>	Ramping Up Your Payroll with Accounting CS <b>TR</b>	Payroll Compliance: 2019 and 2020 Legislation Update <b>TR</b>	9	Proven Marketing and Sales Strategies to Grow Payroll Services <b>Manning</b>	Advanced Employee Setup with Accounting CS <b>Heidelmaier</b>	SwipeClock Integration with Accounting CS Payroll <b>Heidelmaier</b>	Payroll Compliance: 2019 and 2020 Legislation Update <b>TR</b>	9	Prepping for Payroll Year End Using Accounting CS <b>TR</b>
10	Health Care Reform: What's Changed and Changing Under the Affordable Care Act <b>TR</b>	Treacherous "C"s: Form 1094/1095 Navigational Aids for ALEs <b>TR</b>	Tax Compliance Processing Using Accounting CS Payroll <b>TR</b>	Prepping for Payroll Year End Using Accounting CS <b>TR</b>	10	Advanced Payroll Services Using Accounting CS <b>TR</b>	Key Compliance Issues for Account-Based Health Plans <b>TR</b>	Streamlining Your Payroll Operations with Accounting CS <b>Fleming</b>	Payroll Batch Processing: Complete Payroll Output, Tax Forms, e-Filing, and Liability Payments <b>TR</b>	10	Advanced Tips for Complex Payroll Delivery Using Accounting CS <b>TR</b>
11	Transforming Your Audit Practice <b>TR</b>	Using GoFileRoom and FirmFlow for A&A <b>TR</b>	Managing the Transition to Thomson Reuters' Cloud Audit Suite <b>TR</b>	Top 10 Audit Productivity Tips for Small CPA Firms <b>TR</b>	11	Audit Sampling <b>TR</b>	Using Data Analytics as Part of Your Audit	What's New in the Cloud Audit Suite <b>TR</b>	Creating Powerful Analytical Procedures <b>TR</b>	11	Risk Assessment Leveraging PPC Tools <b>TR</b>
12	Filling Your People Pipeline <b>TR</b>	Maximize Your Marketing with Email, Newsletters, and Social Media <b>TR</b>	Great Uses for Custom Fields in Practice CS <b>TR</b>	Using Checkpoint for Audit Engagements <b>TR</b>	12	Great Uses for Custom Fields in Practice CS <b>TR</b>	Master Your Metrics and Save Time with Social Media Manager <b>TR</b>	Retaining Top Talent <b>TR</b>	Beyond Ticking and Tying: Transforming Your Assurance Process <b>Godwin</b>	12	Maximizing Multi-Entity Success Using Consolidations and Divisions in AdvanceFlow <b>Carr</b>
13	Firm Management Using GoFileRoom and FirmFlow <b>TR</b>	Mergers and Acquisitions: How to Be Successful with Them <b>TR</b>	Set Yourself Apart from the Competition – Partner with a Financial Advisor and Become More Valuable to Your Clients <b>Kuttin</b>	Identifying and Tracking Untapped Business Opportunities Within your Practice CS Database <b>TR</b>	13	AdvanceFlow...It's Not Just for Audits <b>TR</b>	Mergers and Acquisitions: How to Be Successful with Them <b>TR</b>	What's New for GoFileRoom and FirmFlow <b>TR</b>	Identifying and Tracking Untapped Business Opportunities Within your Practice CS Database <b>TR</b>	13	Building Powerful Dashboards and Reports with GoFileRoom, FirmFlow, and APIs <b>TR</b>

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50 Minutes	50 Minutes	100 Minutes	100 Minutes	100 Minutes	50 Minutes	50 Minutes	100 Minutes	100 Minutes			
14	Maximizing Your Firm Administration Staff <b>TR</b>	Give Your Practice CS Dashboards a Tune Up <b>TR</b>	Planning Your Transition to Onvio <b>TR</b>	Getting Started with Onvio Firm Management <b>TR</b>	14	Time and Billing Using Onvio Firm Management <b>TR</b>	Give Your Practice CS Dashboards a Tune Up <b>TR</b>	Projects and Tasks Using Onvio Firm Management Advanced <b>TR</b>	How to Build a Knowledgebase and Intranet Employees Will Love <b>TR</b>	14	Documents and Client Collaboration Using Onvio Firm Management <b>TR</b>
15	Integrated Solutions Concept: Mapping and Data Sharing Best Practices <b>TR</b>	FileCabinet CS Tips for Archiving and Performance Improvement <b>TR</b>	Making the Experience for Your Clients with NetClient CS <b>TR</b>	Practice CS as a Proactive Management Tool <b>TR</b>	15	Strategic Planning: Generating Revenue and Capacity Projections <b>TR</b>	Utilizing Practice CS to Aid in Collections <b>TR</b>	Integrated Solutions Concept: Mapping and Data Sharing Best Practices <b>TR</b>	Practice CS as a Proactive Management Tool <b>TR</b>	15	Making the Experience for Your Clients with NetClient CS <b>TR</b>
16	What to Expect When Onboarding to UltraTax CS <b>TR</b>	Getting Ready to Move from UltraTax CS to Onvio <b>TR</b>	Project Management and Workflow Using Practice CS <b>TR</b>	Utilizing Onvio Firm Management in Your UltraTax CS Tax Workflow <b>TR</b>	16	Planner CS Essentials <b>TR</b>	Onvio Tax and Onvio Fixed Assets <b>TR</b>	Powerful Tax Financial Tools Using Toolbox CS <b>TR</b>	Communicate Results with Planner CS <b>Bupp</b>	16	Project Management and Workflow Using Practice CS <b>TR</b>
17	Making Processing Easy: Updating Your UltraTax CS Print Collations <b>TR</b>	Preparing Personal Property Tax Returns in Fixed Assets CS and UltraTax CS <b>TR</b>	Individual Tax Update <b>Van Der Aa</b>	Business Tax Update <b>Van Der Aa</b>	17	Individual Tax Update <b>Van Der Aa</b>	Processing Inventory with Fixed Assets CS <b>TR</b>	Making Processing Easy: Updating Your UltraTax CS Print Collations <b>TR</b>	Business Tax Update <b>Van Der Aa</b>	17	e-Filing Within UltraTax CS <b>TR</b>
18	Incorporating eSignatures into Your UltraTax CS Workflow <b>TR</b>	Trial Balance Usage and Integration with GoSystem Tax RS <b>TR</b>	Tools that Reduce Manual Data Entry Within GoSystem Tax RS <b>TR</b>	What's Been Added in GoSystem Tax RS Over the Past Few Years <b>TR</b>	18	What's New in GoSystem Tax RS <b>TR</b>	Trouble Shooting Your e-File Using GoSystem Tax RS <b>TR</b>	TCJA with GoSystem Tax RS <b>TR</b>	GoSystem Tax RS Tips and Tricks <b>TR</b>	18	Preparing 1041, 706, and 709 Returns Using UltraTax CS <b>TR</b>
19	Mastering Partner Information Data Entry Within UltraTax CS <b>TR</b>	Preparing 990 and 5500 Returns Using UltraTax CS <b>TR</b>	Navigating the Complexities of QBI and 199A with UltraTax CS <b>TR</b>	Reviewing Returns Within UltraTax CS <b>TR</b>	19	Advanced 1040 Return Preparation Using UltraTax CS <b>TR</b>	Mastering Partner Information Data Entry Within UltraTax CS <b>TR</b>	Track the Progress of Returns in UltraTax CS Using the Client Status Workflow Tool <b>TR</b>	Navigating the Complexities of QBI and 199A with UltraTax CS <b>TR</b>	19	Advanced 1040 Return Preparation Using UltraTax CS <b>TR</b>
20	Advance Your Keyword Search Skills and Techniques on Checkpoint <b>TR</b>	Must-See State and Local Tax Features on Checkpoint <b>TR</b>	Developing a Creative Reward Program that Truly Motivates <b>Wiley</b>	Is My Client's Business a Tax Shelter <b>TR</b>	20	Time-Saving Tips on Federal Tax Research Using Checkpoint <b>TR</b>	Tax Research Made Simple Using Checkpoint Edge <b>TR</b>	Tax Research Made Simple Using Checkpoint Edge <b>TR</b>	Is My Client's Business a Tax Shelter? <b>TR</b>	20	Reviewing Returns Within UltraTax CS <b>TR</b>
21	Section 199A: Everything You Must Know and More! <b>TR</b>	The Nuts and Bolts of the Research and Development Tax Credit <b>TR</b>	Getting Ready for Busy Season Using UltraTax CS <b>TR</b>	Processing Clients with Foreign Activities Using UltraTax CS <b>TR</b>	21	Processing Multi-State Returns Within UltraTax CS <b>TR</b>	Section 199A: Everything You Must Know and More! <b>TR</b>	Will Your Interest Be Limited? Understanding the New 163(j) Interest Rules <b>TR</b>	What's Cool in Technology These Days <b>TR</b>	21	Processing Multi-State Returns Within UltraTax CS <b>TR</b>

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50 Minutes	50 Minutes	100 Minutes	100 Minutes	100 Minutes	50 Minutes	50 Minutes	100 Minutes	100 Minutes			
22	What's New in UltraTax CS TR	What's New in UltraTax CS TR	Finding Capacity Campbell	10 Years of UltraTax CS Enhancements: Are You Using Them? TR	22	UltraTax CS Paperless Tax Workflow Overview TR	What's New in UltraTax CS TR	Are You Taking Advantage of All the Features of Fixed Assets CS? TR	10 Years of UltraTax CS Enhancements: Are You Using Them? TR	22	Sales Tax Update TR
23	Advising Clients Who Can't Pay Their Taxes TR	Advising Clients Who Can't Pay Their Taxes TR	Get Exclusive Access to our Latest AI-enabled Prototypes and Solutions for Tax Professionals TR	Active Lead Generation and Firm Growth Through Networking Manning	23	Get Exclusive Access to our Latest AI-enabled Prototypes and Solutions for Tax Professionals TR	Getting Your Questions Answered with Digital Resources! TR	Checkpoint Marketing Social Media Manager Basics TR	Change Readiness for Tax Professionals TR	23	Change Readiness for Tax Professionals TR
24	Top 10 Microsoft Excel Tips for Accounting Professionals TR	Apps You Love Researched by Industry Experts TR	Microsoft Outlook for Accounting Professionals TR	What's Cool in Technology These Days TR	24	Microsoft Teams for Accounting Professionals TR	Data Breach Preparation and Response 101 Tagliaferri	Top 10 Microsoft Excel Tips for Accounting Professionals TR	Microsoft OneNote for Accounting Professionals TR	24	Microsoft OneNote for Accounting Professionals TR
25	Cloud Security TR	How Cybersecurity Can Be a Marketing Asset TR	Cyber Security Review of 2019 TR	Data Security: Assessing the Risks in Your Office TR	25	Security Features Within the Tax and Payroll Applications TR	Cloud Security TR	Security Essentials for Accounting Firms Kepczyk	Protecting Your Firm and Clients from Security Threats TR	25	Data Security: Assessing The Risks in Your Office TR
26	Getting Your Questions Answered with Digital Resources! TR	Lean Six Sigma CPA Firm Administration Kepczyk	Creating Firm Culture, Definition, Distinction, and Decision Manning	Employee Engagement: Productive, Efficient, and Happy Manning	26	Set Yourself Apart from the Competition – Partner with a Financial Advisor and Become More Valuable to Your Clients Kuttin	Optimizing Your Tax Season Debrief Kepczyk	Your Client Just Fired You, Now What? TR	Building Firm Value: Positioning for Exit Manning	26	Firm Secrets to Success: Real Actionable Ideas Seale
27	Situational Leadership TR	Best Practices for Managing a Remote Team TR	Employee Engagement: Building Accountability in Your Teams TR	An Essential Future Requirement: Becoming a Thought Leader Wiley	27	Using Lean Principles to Maximize the Role of Technology Campbell	Best Practices for Managing a Remote Team TR	Collaborative Negotiation TR	Using Emotional Intelligence to Achieve Results TR	27	Making Engaging Client Presentations TR
28	Leveraging Change in Your Office TR	Art of the Deal on Selling Accounting Platforms Seale	Building a Firm Focused on Trusted Advisor and Client Services: Your New Firm Model Miller	Make Your Firm a Trusted Advisor Martukovich	28	Advisory Services: Moving Your Practice Forward TR	Advisory Service Opportunities Based on What We Now Know with TCJA Miller	The Art of The Ask – Grow Your Practice with Referrals Mora	Creating Client Engagements Based on an Advisory Services Firm Model Miller	28	Get Yourself Out of Operations So You Can Be a Firm Leader Martukovich
INNOVATION	Help Shape the Future of Tax Professional Work Solutions (DOES NOT QUALIFY FOR CPE)	Help Shape the Future of Tax Professional Work Solutions (DOES NOT QUALIFY FOR CPE)			INNOVATION	Help Shape the Future of Tax Professional Work Solutions (DOES NOT QUALIFY FOR CPE)	Help Shape the Future of Tax Professional Work Solutions (DOES NOT QUALIFY FOR CPE)	Help Shape the Future of Tax Professional Work Solutions (DOES NOT QUALIFY FOR CPE)		INNOVATION	