

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Tax & Accounting Professionals										
How to Transition & Work in the NEW Browser Independent Version of AdvanceFlow & Checkpoint Engage	11/10/20 7:00 AM	50 Minutes	This session will introduce the new browser independent AdvanceFlow and Checkpoint Engage. This includes the process of converting from Internet Explorer to the new browser independent version.	Upon completion of this session, you will be able to: • Review trial balance differences between the two browsers • Set up new engagements • Add workpapers including Checkpoint Engage • Integrate AdvanceFlow and/or Checkpoint Engage in the new browser • Add workpapers including Checkpoint Engage • Identify and assess risks • Review/modify audit programs • Complete procedural and document level sign-offs • Utilize Linkage View • Add Workpaper Reference Links • Customize and Complete Disclosure Checklist	Participants should have a working knowledge of AdvanceFlow and Checkpoint Engage.	Any User	Intermediate	1	Auditing	Computer Software & Applications – Non-Technical
Managing Your Projects in Practice CS	11/10/20 7:00 AM	75 Minutes	In this session discover how dashboards can help you manage your workload and track client work. Learn the differences and advantage to using the manage projects screen vs. a project management report.	Upon completion of this session, you will be able to: • Design project portlets • Apply filters and groupings • Identify different project reports for firm management	Participants should be familiar with the firms projects and workflow.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
UltraTax CS 1120 Preparation	11/10/20 7:00 AM	75 Minutes	Learn how to prepare corporate tax returns including S-Corporation returns.	Upon completion of this session, you will be able to: • Demonstrate data entry of general client demographic information • Apportion net income to appropriate state returns as required • Demonstrate officer information and shareholder data entry when applicable • Prepare tax returns with ordinary business income and additional activities • Manage Fixed Assets information • Indicate and track Qualified Business Income (199A) • Demonstrate balance sheet and Schedules M-1 and M-2	A participant should be familiar with basic UltraTax CS navigation.	Any User	Basic	1.5	Tax & Asset Management	Taxes – Technical
Connecting Accounting CS and QuickBooks	11/10/20 7:00 AM	100 Minutes	In this session, we'll introduce the QuickBooks import capabilities of Accounting CS and Accounting CS Payroll. This session is recommended for firms that would like to begin integrating QuickBooks data with Accounting CS and Accounting CS Payroll.	Upon completion of this session, you will be able to: • Evaluate the import workflows available from Intuit products, such as QuickBooks Pro and QuickBooks Online • Import chart of accounts and balances into Accounting CS • Import client setup and transactions into Accounting CS • Examine imported data and review the associated reports • Make modifications to imported data	A participant should be familiar navigating in Accounting CS and have experience working in QuickBooks.	Any User	Intermediate	2	Client Accounting	Accounting – Technical
GoSystem Tax RS: Utilizing Self-Service Resources and Best Practices	11/10/20 7:00 AM	100 Minutes	In this session, we will learn about the self-service resources within GoSystem Tax RS, as well as various best practice tools within the software.. Participants should understand the GoSystem Tax RS program.	Upon completion of this session, you will be able to: • Use the self- service resources built into GoSystem Tax RS • Track milestones • Track time • Complete tasks	No pre-requisites	Any User	Intermediate	2	Tax & Asset Management	Computer Software & Applications – Non-Technical
2020 Lookback Beyond Covid-19 (Tax Update)	11/10/20 8:00 AM	50 Minutes	While 2020 has been an unprecedented year as a result of a pandemic, there have been numerous tax law updates impacting key areas of U.S. taxation. From notices and administrative releases to revenue rulings and judicial	Upon completion of this session, you will be able to: • Describe many of the 2020 key legislative provision impacting business and individuals that were enacted outside of the CARES & SECURE Act.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Filling Your People Pipeline	11/10/20 8:00 AM	50 Minutes	Finding talent is no longer as easy as it used to be. How do you interview to hire the intern or experienced staff that will be the best fit for your firm? This session will focus on interview skills, intern finding and keeping if they are worth it, and	Upon completion of this session, you will be able to: • Learn interview techniques to spot and hire the ones that will fit your firm • Learn how to seek out interns and staff and onboard them with success for a	No pre-requisites	Any User	Intermediate	1	Trends in the Profession	Personnel/Human Resources – Non-Technical
UltraTax CS Printing and Electronic Filing	11/10/20 8:00 AM	50 Minutes	This session provides information on tax return production, including delivering returns to your clients, creating and transmitting returns to taxing agencies, and retaining file copies of the return.	Upon Completion of this session, you will be able to: • Distinguish between and produce government, client, and preparer copies of tax returns • Produce extensions and print selected pages and reports • Apply watermarks and field masking • Create electronic files for tax returns and extensions • Transmit electronic files to taxing agencies and client tax returns and eSignature requests to client portals • Manage electronic filing status efficiently across the firm	A participant should have a working knowledge of UltraTax CS 1040, 1120, or 1065.	Any User	Basic	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
What's New in Onvio Firm Management	11/10/20 8:00 AM	50 Minutes	Check out the added features and improvements that have been released in Onvio Firm Management in the last year, including key tax workflow integrations with UltraTax CS. Also, spend some time reviewing features designed to save you time and effort in your workflow.	Upon completion of this session, you will be able to: • Understand the difference between Onvio Firm Management Essentials and Advanced • Identify recent enhancements to Onvio Firm Management • Understand how these features may benefit your firm and clients	No pre-requisites	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
The Contactless Tax Return Using UltraTax CS	11/10/20 8:00 AM	75 Minutes	This session will demonstrate tax return workflow tools in UltraTax CS that can streamline tax preparation, including paperless and contactless workflow.	Upon completion of this session, you will be able to: • Use automatic data gathering through Web Client Tools, Source Document Processing, and more • Deliver drafts, final returns, and actionable items securely through client portals	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Overview	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical
Payroll Tax Compliance: 2020 and 2021 Legislative Update	11/10/20 9:00 AM	50 Minutes	In this session, we will discuss several topics you need to know to prepare for year-end processing, as well as the latest in federal and state payroll changes and proposals for 2021. If you offer payroll services, you won't want to miss this session.	Upon completion of this session, you will be able to: • Understand the latest tax reform items that affect payroll including: 2020-2021 federal budget proposals, Taxpayer First Act, Truncated W-2s and new requirements to box 14, 1099-NEC & 1099-MISC, ACA/AHA requirements for employers and Cybersecurity • Discover new IRS initiatives, payroll reconciliation, Covid-19 Legislation, state withholding, new hire reporting, escheat rules, unemployment and deficit states, state sick pay, fringe benefits, and more • Discuss topics related to the 2020-2021 W-4, including the impact at federal and state levels. • Utilize tips to make year-end processing more efficient and effective	No pre-requisites	Any User	Overview	1	Payroll	Taxes – Technical
Advanced Data Mining in UltraTax CS	11/10/20 9:00 AM	75 Minutes	Data Mining is a versatile tool that allows you to query your UltraTax CS client database for specific data and client characteristics. In this session, we will delve into configuration of custom reports, letters, and searches in data mining to allow you to tailor data mining output to your client base.	Upon completion of this session, you will be able to: • Configure custom searches to leverage information already in your tax database • Locate opportunities to provide advisory and other value-added searches	A participant should have a working knowledge of Data Mining within UltraTax CS	Any User	Advanced	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical
Microsoft Outlook for Accounting Professionals	11/10/20 9:00 AM	75 Minutes	In this session, we will discuss how you can take your knowledge of Microsoft Outlook to a whole new level! You'll walk away with several quick solutions that will make you more efficient. If you're new to Outlook, or have been using Outlook for years, you won't want to miss this session!	Upon completion of this session, you will be able to: • Take advantage of Outlook's advanced email, calendar, and task functions • Create and use templates to drastically reduce time • Identify how to clean up your inbox by scheduling emails as calendar appointments or tasks	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1.5	Technology	Computer Software & Applications – Non-Technical
Reporting, Filtering and the Manage Screens in Practice CS	11/10/20 9:00 AM	75 Minutes	In this session you will learn when to use a report vs. realtime data on the manage screens in Practice CS. Dive deeper into filtering and nested filters and uncover how to manipulate data real time.	Upon completion of this session, you will be able to: • Create nested filters • Manipulate data on screen • Explain why to filter, group vs. detail reports by	Participants should have a working understanding of Practice CS.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Streamline Setup and Onboarding of New Payroll Clients in Accounting CS	11/10/20 9:00 AM	75 Minutes	In this session, you'll learn about the efficiency tools available in Accounting CS Payroll when onboarding new clients into the application.	Upon completion of this session, you will be able to: • Create client templates and use the Transfer Client Information feature to standardize the setup of your payroll clients • Use spreadsheet imports to setup employees and vendors • Configure employee templates to increase the efficiency of setting up employees • Prenote direct deposit information • Complete new hire reporting	No pre-requisites	Any User	Intermediate	1.5	Payroll	Computer Software & Applications – Non-Technical
Increase Advisory and Maintenance Revenue with Marketing	11/10/20 9:00 AM	100 Minutes	In this session, you will learn how to increase advisory and maintenance revenue with marketing as Mark Martukovich shares his strategies including LinkedIn, videos, blogs, social media, YouTube channels, and more! Attending this session will help you recognize the how, when, where, and with what of it all. Come learn what it takes to increase advisory and maintenance revenues with	Upon completion of this session, you will be able to: • Increase advisory and maintenance revenue • Identify marketing strategies for increasing advisory and maintenance revenue	No pre-requisites	Any User	Overview	2	Advisory	Business Management & Organization – Non-Technical
Plan & Execute Audit Engagements Using the Thomson Reuters Cloud Audit Suite	11/10/20 9:00 AM	100 Minutes	In this session, you will learn how to effectively use the integration between AdvanceFlow and Checkpoint Engage for your audit engagements.	Upon completion of this session, you will be able to: • Setup new AdvanceFlow and Checkpoint Engage engagements • Import and filter trial balances • Create leadsheets and other custom reports • Identify and assess risks • Review/modify audit programs • Utilize Linkage View • Generate documents • Perform procedural and document-level sign-offs • Create Workpaper Reference Links • Customize and complete a Disclosure Checklist • Introduced to Info and Confirmation integration with the Cloud Audit Suite	No pre-requisites	Any User	Intermediate	2	Auditing	Auditing – Technical
Security in a Mobile World	11/10/20 9:00 AM	100 Minutes	Mobile security is a top concern moving forward for companies and for good reason. With more employees now working remotely and accessing firm data from smart devices, keeping sensitive information safe has become more difficult	Join our session as we discuss: • Mobile security vs. cloud security • Trending security attacks • What companies can do	No pre-requisites	Any User	Overview	2	Security	Information Technology – Technical

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UltraTax CS 1040 Preparation	11/10/20 9:00 AM	100 Minutes	Learn how to enter information in an individual return to reflect a variety of income situations, from W-2 wages to sole proprietorships and retirement income.	Upon completion of this session, you will be able to: • Enter general client demographic information • Report information from W-2 and 1099 income statements • Prepare Schedules C and E for business owners • Demonstrate data entry for education information and credits • Demonstrate data entry for federal and state payment and penalty information • Distinguish between Federal- and State-related data entry	A participant should be familiar with basic UltraTax CS navigation.	Any User	Basic	2	Tax & Asset Management	Taxes – Technical
Are You Taking Advantage of All the Features of Fixed Assets CS?	11/10/20 10:00 AM	50 Minutes	Attending this session will help you use Fixed Assets CS for more than just entering or disposing of assets. You will walk away from this session seeing how to use Fixed Assets CS in other ways, and learn about additional features the application has to offer	Upon completion of this session, you will be able to: • Apply underutilized features of Fixed Assets CS to boost your workflow efficiency	A participant should have a working knowledge of using Fixed Assets CS	Any User	Intermediate	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
Working with Net Operating Losses in UltraTax CS	11/10/20 10:00 AM	50 Minutes	In this session, you will get a refresher on Net Operating Loss Carryforwards and Carrybacks, including data entry to recalculate prior-year returns when necessary.	Upon completion of this session, you will be able to: • Enter prior-year carryover information into new clients • Process returns with a Net Operating Loss • Determine data entry to recalculate prior-year returns	A participant should have a working knowledge of UltraTax CS	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Business Tax CARES Act Provisions – What's New	11/10/20 12:00 PM	50 Minutes	On March 27, 2020, President Trump signed the "Coronavirus Aid, Relief, and Economic Security Act" (CARES Act) into law. In addition to several key individual tax provisions, this law – which marks the single largest economic stimulus package in history – includes substantive tax legislation impacting businesses and business entity returns. This session highlights the enacted tax provisions affecting businesses such as net operating loss ("NOL") carrybacks, employee retention credits, payroll tax deferrals, modification of the interest expense limitations and technical amendments regarding qualified improvement property. Participants and attendees will be equipped to navigate the new pronouncements and legislation for purposes of filing 2020 business entity	Upon completion of this session, you will be able to: • Describe key business tax provisions in the recently enacted CARES Act, which provides economic relief and support for businesses and individuals impacted by the Coronavirus pandemic. • Describe the delayed payment of employer payroll taxes • Identify key characteristics of the modifications associated with the limitation of business interest • Review the technical amendments regarding qualified improvement property • Distinguish and identify the various rules of how to obtain carryback relief of certain business losses.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Payroll Tax Compliance: 2020 and 2021 Legislative Update	11/10/20 12:00 PM	50 Minutes	In this session, we will discuss several topics you need to know to prepare for year-end processing, as well as the latest in federal and state payroll changes and proposals for 2021. If you offer payroll services, you won't want to miss this session.	Upon completion of this session, you will be able to: • Understand the latest tax reform items that affect payroll including: 2020-2021 federal budget proposals, Taxpayer First Act, Truncated W-2s and new requirements to box 14, 1099-NEC & 1099-MISC, ACA/AHA requirements for employers and Cybersecurity • Discover new IRS initiatives, payroll reconciliation, Covid-19 Legislation, state withholding, new hire reporting, escheat rules, unemployment and deficit states, state sick pay, fringe benefits, and more • Discuss topics related to the 2020-2021 W-4, including the impact at federal and state levels. • Utilize tips to make year-end processing more efficient and effective	No pre-requisites	Any User	Overview	1	Payroll	Taxes – Technical
Top 10 Microsoft Excel Tips for Accounting Professionals	11/10/20 12:00 PM	50 Minutes	In this session, we will discuss how you can be more efficient with Microsoft Excel. Do you consider yourself proficient with Excel but not an expert? You won't want to miss this session!	Upon completion of this session, you will be able to: • Apply 10 quick tips to bring greater efficiency to using Microsoft Excel • Identify how to easily navigate, utilize timesaving functions • Apply consistent formatting • Customize the status bar	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1	Technology	Computer Software & Applications – Non-Technical
GoSystem Tax RS What's New?	11/10/20 12:00 PM	75 Minutes	In this session you will learn about new features in GoSystem Tax RS for the upcoming 2020 tax year. This will assist your firm in processing returns efficiently for next years tax season. Participants should have a working knowledge of GoSystem Tax RS.	Upon completion of this session, you will be able to: • Understand data entry changes within GoSystem Tax RS • Integrate K-1 Analyzer with GoSystem Tax RS locators • Utilize help resources to assist with understanding these changes	No pre-requisites	Any User	Overview	1.5	Tax & Asset Management	Taxes – Technical
Onvio 2020 Update	11/10/20 12:00 PM	75 Minutes	Come and see the latest tax and accounting web-based software, Onvio! We will review the Onvio platform and applications that are available today along with what's on the horizon. Take a look back on how this cloud-based platform has been designed for the tax and accounting professional using the latest technology. And, find out how to prepare your firm to move from the desktop to a desktop application	Upon completion of this session, you will be able to: • Understand the vision and the value of the Onvio platform • Know what applications are available within the Onvio platform • Update your firm on the benefits and expectations of moving to Onvio from a desktop application	No pre-requisites	Any User	Overview	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Researching From Within UltraTax CS	11/10/20 12:00 PM	75 Minutes	This session will help you understand the research tools available in UltraTax CS, including agency instructions and publications, as well as subscription-based resources from Checkpoint.	Upon completion of this session, you will be able to: • Access PPC Deskbooks from input screens for relevant tax guidance • Navigate from tax forms to instructions from taxing agencies as well as guidance from Form/Line Finder • Use shortcuts to access Checkpoint for additional web-based tools	A participant should be familiar with UltraTax CS	Any User	Overview	1.5	Tax & Asset Management	Taxes – Technical
UltraTax CS 1065 Preparation	11/10/20 12:00 PM	75 Minutes	Learn how to prepare partnership tax returns featuring multiple income types and allocation schemes.	Upon completion of this session, you will be able to: • Enter general client demographic information • Manage partner information including demographic details, allocation, and changes of ownership • Prepare tax returns with multiple activities • Manage Fixed Assets Information • Distinguish between and apply different methods of special allocation • Indicate and track Qualified Business Information (199A)	A participant should be familiar with basic UltraTax CS navigation.	Any User	Basic	1.5	Tax & Asset Management	Taxes – Technical
Moving Your Practice Forward	11/10/20 12:00 PM	100 Minutes	How are you getting paid for the value (e.g., ideas, strategies, and solutions) you bring to your clients separate from the physical compliance deliverables? How are you defining the clarity and setting the proper expectations in your client relationships? How are you creating highly duplicable services to help your clients reach their financial goals and aspirations? Join us for a Practice Forward discussion where you'll learn how to take steps to enhance clarity in client relationships, improve margins, and create a progressive set of new client services that extend beyond compliance work. We will share our consulting experiences with planning and executing a business model shift, including aligning staff, identifying monetizable new client services, adopting supportive technology and workflow, and much more. It's all part of the journey to building a firm that offers higher value to clients, operates in a more sustainable business model, and generates a healthier bottom line. Learn how to become a	Upon completion of this session, you will be able to: identify new uses for Onvio Advisory to enhance your practice's advisory services and deepen relationships with your clients.	No pre-requisites	Any User	Overview	2	Advisory	Business Management & Organization – Non-Technical
Power Automate – Using the GoFileRoom Connector	11/10/20 12:00 PM	100 Minutes	In this session we will introduce Microsoft Power Automate. We will discuss using the GoFileRoom connector. You will also hear example use cases for using Microsoft Power Automate with GoFileRoom.	Upon completion of this session, you will be able to: • Create a Microsoft Flow • Use the GoFileRoom Connector • Make modifications to data • Understand different use cases for using Microsoft Power Automate with GoFileRoom	This session is recommended for firms that use GoFileRoom. A participant should be familiar with the concept of APIs (application programming interface).	Any User	Advanced	2	Technology	Computer Software & Applications – Non-Technical
Streamlining Business Tax Workflow Using Trial Balance Tools for Accounting CS and Workpapers CS	11/10/20 12:00 PM	100 Minutes	In this session, you will learn about time-saving features in Accounting CS and Workpapers CS that speed year end processing for your business clients.	Upon completion of this session, you will be able to: • Add a client's chart of accounts and account balances via Excel spreadsheet import • Identify and assign tax coding for integration with UltraTax CS using account grouping and standard account mapping • Import depreciation journal entries from Fixed Assets CS • Print a set of financial statements • Utilize the Analyze Client Activity on-screen review tool • Integrate the trial balance with UltraTax CS • Enter Tax Code Adjustments (tax reconciliation)	A participant should be familiar with navigating the Accounting CS application, and have knowledge on UltraTax CS and Fixed Assets CS.	Any User	Intermediate	2	Accounting	Taxes – Technical
Using Agile Principals to Drive Innovation and Productivity with a Non-Development Team	11/10/20 1:00 PM	50 Minutes	Business Agility is a global industry trend. Thousands of organizations outside of the product development world have adopted Agile principles, enabling them to respond more quickly to both opportunities and threats. Organizations regardless of size or the work that they do gain value through Agility. Any business in today's virtual frontier and competitive market environment will benefit from an adaptive approach that is quick to rethink, react and constantly improve processes to deliver ultimate value for a new generation of customers.	Upon completion of this session, you will be able to: • Understand some core principles of Business Agility • Learn how to use aspects of Agile methods to drive innovation and productivity.	No pre-requisites	Any User	Basic	1	Trends in the Profession	Business Management & Organization – Non-Technical

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Mastering Remote Returns: Automating the Assembly, Delivery and eSign process	11/10/20 1:00 PM	50 Minutes	In this session, we will review how tax forms 1040, 1041, 1065, 1120 & 1120S can be assembled and delivered from home by staff, and clients can review and eSign remotely. In addition, you will see how K-1s can be electronically batch processed for delivery by the client, how to automate estimated payment reminders, and much more. We will also ensure you are up-to-date on the IRS	Upon completion, you'll be able to: • Streamline the electronic delivery of tax returns regardless of return type • Standardize reporting and tracking of tax returns • Shrink the assembly of tax returns • Understand how to electronically distribute K-1 to shareholders and partners	Participants should be familiar with the tax return assembly and delivery process.	Any User	Basic	1	Tax & Asset Management	Taxes – Technical
Train the Trainer – Improving Your Presentation Skills	11/10/20 1:00 PM	75 Minutes	In this session, you'll learn how to improve your skills in delivering live presentations. Whether you instruct your own staff or deliver training or demonstrations for clients, you will learn tips and tricks for more effective	Upon completion of this session, you will be able to: • Manage classroom dynamics • Engage an audience, whether in person or remote • Identify levels of learning, and how to meet an audience's expectations	No pre-requisites	Any User	Basic	1.5	Trends in the Profession	Communications and Marketing – Non-Technical
Using Technology to Perform Trusted and Efficient Audits	11/10/20 1:00 PM	75 Minutes	With recent major frauds making headlines globally, it's more important than ever to perform a trustworthy audit. In this session, you'll see that one of the easiest ways to help do that is by using an electronic, third-party platform to confirm cash balances. Using this type of technology is now a recommended audit standard. In addition to providing trusted audit evidence, a platform like this also makes your audits easier. Each confirmation request is completed from start to finish online, and all of the information is stored year after year on the secure platform. You can also confirm more than just cash balances. Legal, AR/AP, and EBP (401k) confirmations can all be handled in the same platform.	Upon completion of this session, you will be able to: • Articulate why it's important to get a third-party confirmation every time you do an audit (risk mitigation) • Use the Confirmation platform to make your audits more efficient • Know how to do more than just cash confirmations in the platform LEVEL: Overview	No pre-requisites	Any User	Overview	1.5	Auditing	Auditing – Technical
Explore Employee Onboarding and Time Entry Integration with SwipeClock and Accounting CS	11/10/20 2:00 PM	50 Minutes	In this session, you will learn about the direct integration between SwipeClock and Accounting CS for employee time entry and employee onboarding.	Upon completion of this session, you will be able to: • Integrate with WorkforceHUB for employee onboarding • Use SwipeClock for employee time entry • Process payroll checks for Swipeclock clients	A participant should be familiar with how to setup payroll data and process payroll transactions in Accounting CS.	Any User	Advanced	1	Payroll	Computer Software & Applications – Non-Technical
Federal Tax Research on Checkpoint Edge	11/10/20 2:00 PM	50 Minutes	In this session, you will learn how to find answers to your federal tax questions faster than ever before. You will see how to use predictive technology and concept markers to improve the quality and precision of your query even when you aren't sure what keywords to use or related topics you might need to	Upon completion of this session, you will be able to: • Use links on the main screen to browse materials, get to tools, and more • Take advantage of predictive queries • Filter search results • Use Concept Markers to focus your search • View results from trusted public sites	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
GoSystem Tax RS Letters and Filing Instructions	11/10/20 2:00 PM	50 Minutes	In this session you will learn how to customize your letters and filing instructions. This will help standardize your letters and instructions while also allowing flexibility to the prepares to include or exclude sections. Participants should have knowledge of GoSystem Tax.	Upon completion of this session, you will be able to: • Create sections • Utilize print conditions • Modify preparer options • Create advanced preparer options	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
How to Effectively Run a Virtual Meeting	11/10/20 2:00 PM	50 Minutes	Running an in-person meeting isn't applies to aples to running a virtual meeting. Learn how to prepare, manage and engage your audience to deliver an effective virtual meeting.	Upon completion of this session, you will be able to: learn tips and tricks to ensure your virtual meetings accomplish your goals while fostering active participation.	No pre-requisites	Any User	Basic	1	Trends in the Profession	Communications and Marketing – Non-Technical
Making Cybersecurity a Company Asset	11/10/20 2:00 PM	50 Minutes	Navigating your company's cybersecurity needs can be stressful for many reasons, including understanding how your clients and staff feel about security and how can security can help your company thrive.	Join us in this session to learn: • What practices are important for your company, now and tomorrow? • What you can do to promote security with staff and clients? • How to make cybersecurity work for you and your clients!	No pre-requisites	Any User	Overview	1	Security	Information Technology – Technical
Maximizing Staff Management Tools to Better Manage Workload Balance	11/10/20 2:00 PM	50 Minutes	Utilize Practice CS as a central staff management tool to integrate your projects, tasks and scheduled items in one calendar to leverage staff analysis reports. Understand how to set up targets work hours and budgets to maximize staff schedules and increase productivity.	Upon completion of this workshop, you will be able to: • Prioritize and rank assignments • Schedule projects and tasks loosely or exact on staff's calendars • Schedule by calendars or by items on a staff's list • Run staff capacity reports	A participant should be utilizing project management in Practice CS.	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Retaining Top Talent	11/10/20 2:00 PM	50 Minutes	In this session, we will explore some initiatives to help increase employee engagement and retain talent.	Upon completion of this session, you will be able to: • Learn strategies that you can incorporate in your firm to help retain top talent • Gain a better understanding of the potential impact retention strategies have on your bottom line • Learn how to utilize the strategies to better "keep your finger on the pulse" of employee engagement	No pre-requisites	Any User	Intermediate	1	Trends in the Profession	Personnel/Human Resources – Non-Technical
What's New in UltraTax CS	11/10/20 2:00 PM	50 Minutes	In this session, you'll get a jump on next tax season with a preview of new and powerful system-wide, entity-specific, and workflow improvements to UltraTax CS. Join us to understand how the new release impacts your firm and get the most productivity from your UltraTax CS Software	Upon completion of this session, you will be able to: • Use new program features • Understand entity-specific changes for up-to-date tax forms	No pre-requisites	Any User	Overview	1	Tax & Asset Management	Taxes – Technical
Individual Tax CARES Act Provisions – What's New	11/10/20 4:00 PM	50 Minutes	On March 27, 2020, President Trump signed the "Coronavirus Aid, Relief, and Economic Security Act" (CARES Act) into law. This law marks the single largest economic stimulus package in history and is intended to provide relief to the many businesses and individuals impacted by COVID-19. This session focuses on the enacted tax provisions affecting individuals such as the 2020 recovery rebates for individuals, early retirement fund distribution rules, RMD waivers, charitable contribution limitation modifications, and other relevant provisions. session participants will have the working knowledge to apply the CARE Act to individuals filings Form 1040 for the 2020 tax year.	Upon completion of this session, you will be able to: • Describe the various individual tax provisions associated with the CARES Act • Distinguish between key dates and limitations pertaining to net operating losses, carrybacks and other expense and loss provisions • Identify rules pertaining to retirement plan and IRA Penalty-Free Distributions	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Using Teams, OneNote and Planner to Plan and Execute Audits	11/10/20 4:00 PM	50 Minutes	In this session, you will learn how to use Microsoft applications to help plan and execute audits. This session includes Microsoft Teams, OneNote, and Planner	Upon completion of this session, you will be able to: • Utilize Microsoft Teams for collaboration with colleagues • Setup checklists in OneNote to avoid commonly missed items • Use Planner to plan and execute audits	No pre-requisites	Any User	Intermediate	1	Auditing	Computer Software & Applications – Non-Technical
Data Security: Assessing the Risks in Your Office	11/10/20 4:00 PM	75 Minutes	In a mobile world, offices become much more than the bricks and mortar buildings that we have established. As more and more of your staff become remote, if they have not already, the less tangible control you have over your staff. With the rapid changes that were forced upon all of us, have you updated, or even discussed, your Information Security Plan? What new risks have been introduced to your business over the past year alone?	In this session, you will: • Learn about IRS-mandated requirements to safeguard taxpayer data • Identify and assess security risks to taxpayer information in relevant areas of your business operations • Learn how to practice a level of information security that fits for your size company	No pre-requisites	Any User	Overview	1.5	Security	Information Technology – Technical
GoFileRoom and FirmFlow for Other Departments	11/10/20 4:00 PM	75 Minutes	This session will cover ways to utilize GoFileRoom and FirmFlow in other areas of the firm. We will discuss ways to use workflows in assurance and HR.	Upon completion of this session, you will be able to: • Use workflows for assurance jobs • Use workflows for new staff onboarding • Use workflows for an annual review cycle • Manage personnel files in GoFileRoom	No pre-requisites	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
GoSystem Tax RS Trial Balance	11/10/20 4:00 PM	75 Minutes	During this session, we will look at Trial Balance within the new organizer. This session is recommended for firms that would like to utilize the Trial Balance within the software. Participants should be familiar with the GoSystem Tax RS	Upon completion of this session, you will be able to: • Understand new functionality • Import from an outside program • Merge the Trial Balance into the return	No pre-requisites	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Mastering the Two Meeting Approach	11/10/20 4:00 PM	75 Minutes	Attending this session will help you utilize the Two Meeting Approach as part of your Practice Forward methodology. Two of our Practice Forward consultants will role play several scenarios including client rejections, giving away high level ideas, and piquing interest.	Upon completion of this session, you will be able to fine tune your skills using the Two Meeting approach.	No pre-requisites	Any User	Overview	1.5	Advisory	Business Management & Organization – Non-Technical
Microsoft Teams for Accounting Professionals	11/10/20 4:00 PM	75 Minutes	Attending this session will help you to embrace Microsoft Teams as a powerful collaboration tool for your firm. Teams integrates the people, the content, and the tools your team needs to be more engaged and effective. Participants should have a working knowledge of Microsoft Office.	Upon completion of this session, you will be able to: • Define the difference between channels and teams • Schedule and manage (or co-lead) meetings both internally and externally • Use Teams for individual and group chats • Easily navigate and utilize helpful functions like searching and bookmarking • Execute calls and screen sharing in the application • Adjust preferences and settings • Integrate with other applications	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1.5	Technology	Computer Software & Applications – Non-Technical
Leveraging the Best Features and Functions of UltraTax CS	11/10/20 4:00 PM	100 Minutes	Have you ever learned something new in UltraTax CS and wondered, "Hmmm, I wonder how long that's been there?" Are you concerned that you may be missing other tools that can help you boost efficiency? In this fast paced session, we will review some of the most impactful workflow enhancements to UltraTax CS over the past several years, and review features that many preparers are not	Upon completion of this session, you will be able to: • Implement these time-saving features to boost productivity at your firm	A participant must have a working knowledge of UltraTax CS.	Any User	Overview	2	Tax & Asset Management	Taxes – Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Power Automate – Using the GoFileRoom Connector	11/10/20 4:00 PM	100 Minutes	In this session we will introduce Microsoft Power Automate. We will discuss using the GoFileRoom connector. You will also hear example use cases for using Microsoft Power Automate with GoFileRoom.	Upon completion of this session, you will be able to: • Create a Microsoft Flow • Use the GoFileRoom Connector • Make modifications to data • Understand different use cases for using Microsoft Power Automate with GoFileRoom	This session is recommended for firms that use GoFileRoom. A participant should be familiar with the concept of APIs (application programming interface).	Any User	Advanced	2	Technology	Computer Software & Applications – Non-Technical
Streamlining Individual Tax Workflow with Workpapers CS	11/10/20 4:00 PM	100 Minutes	This lecture-style session will focus on the use of Workpapers CS to gather, manage, and process your individual tax Workpapers.	Upon completion of this session, you will be able to: • Use the source document processing (OCR) feature • Work with tax binders • Insert client source documents • Create notes for source documents • Signoff on documents • Wrap-up a tax engagement • Roll an Engagement Binder forward • Learn about Source Document Processing options that allows for grouping of brokerage statements and K-1s along with sorting options and custom folder creation when organizing source documents • Populate clients from UltraTax CS • Integrate Workpapers with NetClient CS File Exchange and Onvio for direct download of client files	A participant should be familiar with the setup of a client in Workpapers CS and navigating the application.	Any User	Intermediate	2	Accounting	Taxes – Technical
UltraTax CS 1040 Preparation	11/10/20 4:00 PM	100 Minutes	Learn how to enter information in an individual return to reflect a variety of income situations, from W-2 wages to sole proprietorships and retirement income.	Upon completion of this session, you will be able to: • Enter general client demographic information • Report information from W-2 and 1099 income statements • Prepare Schedules C and E for business owners • Demonstrate data entry for education information and credits • Demonstrate data entry for federal and state payment and penalty information • Distinguish between Federal- and State-related data entry	A participant should be familiar with basic UltraTax CS navigation.	Any User	Basic	2	Tax & Asset Management	Taxes – Technical
Leverage Practice CS as a Firm Administrator	11/10/20 5:00 PM	75 Minutes	If you use Practice CS not only for your Practice Management tool but as your CRM, Project Management, Staff Management or a combination, as a part of the administration team it is your responsibility to maintain the database and ensure the accuracy of your data. Monthly and yearly processes will help you maintain a clean database, allowing to extract the reporting you are responsible to supply. This session will touch on different areas of the program to help the administration team ensure they are leveraging the data. From the initiation and termination of a client or staff member to year end cleanup that should be	Upon completion of this session, you will be able to: • Identify internal controls to ensure accurate data • Discover methods to track information • Discover how your administrator can manage utilizing real-time data in the program • Identify month end and year end firm procedures	Participants should have an understanding of their firms processes.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Onvio Tax & Fixed Assets: Tax Workflow Preview	11/10/20 5:00 PM	75 Minutes	Interested in discovering a newer and better tax workflow for your firm? One that is completely digital, has the capacity to interact with your clients, and provides you and your staff with access to numerous ways to integrate, automate, and add intelligence to your workflow? Meet the preeminent cloud-based tax workflow of today and tomorrow with Onvio Tax & Fixed Assets at the center. This session will unveil a host of exciting new capabilities as well as jurisdictional filing support available in Onvio Tax & Fixed Assets for the upcoming tax season. We will showcase the progress that has been made in the system designed to bring efficiency and add value to your firm's tax workflow.	Upon completion of this session, you will be able to: • Understand how Onvio Tax & Onvio Fixed Assets benefit from living within the overall Onvio ecosystem • See various tax workflow examples in action using Onvio Tax and Onvio Fixed Assets • Identify emerging and enabling technologies firms must consider in order to avoid an outdated tax workflow	No pre-requisites	Any User	Overview	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical
FileCabinet CS Tips for Archiving and Performance Management	11/10/20 6:00 PM	50 Minutes	In this session, you will learn best practices for archiving to increase performance in FileCabinet CS.	Upon completion of this session, you will be able to: • Create, delete, restore, and append an archive • Prepare FileCabinet CS data for migration • Troubleshoot performance-related issues with FileCabinet CS	A participant should have a working knowledge of FileCabinet CS	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Project Management for Assurance Engagements	11/10/20 6:00 PM	50 Minutes	This session will discuss the challenges in managing our clients, internal barriers, and describe best practices in project management.	Upon completion of this session, you will be able to: • List ideas for how to improve your client management and project wrap up • Describe ways to get more PBC items from your clients in a timely manner • Identify strategies to work better as a team, including getting reviews done more timely	Participants should have a working knowledge of how poorly some audits are executed.	Any User	Intermediate	1	Auditing	Auditing – Technical
Preparing Personal Property Returns in Fixed Assets CS and UltraTax CS	11/11/20 7:00 AM	50 Minutes	Attending this session will help you understand efficient preparation of personal (or "tangible") property tax returns using UltraTax CS and Fixed Assets CS. Within UltraTax CS, we will activate asset associations and use the reassign asset feature to create a PPT return using data already entered for depreciation. We will also look at time-saving tools in Fixed Assets CS that allow for efficient	Upon completion of this session, you will be able to: • Activate asset associations tailored to PPT return • Reassign existing assets • Configure Fixed Assets CS for efficient PPT data entry	A participant should be familiar with asset data entry in UltraTax CS. Participants do not need prior Fixed Assets CS experience.	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
UltraTax CS 1065 Preparation	11/11/20 7:00 AM	75 Minutes	Learn how to prepare partnership tax returns featuring multiple income types and allocation schemes.	Upon completion of this session, you will be able to: • Enter general client demographic information • Manage partner information including demographic details, allocation, and changes of ownership • Prepare tax returns with multiple activities • Manage Fixed Assets Information • Distinguish between and apply different methods of special allocation • Indicate and track Qualified Business Information (199A)	A participant should be familiar with basic UltraTax CS navigation.	Any User	Basic	1.5	Tax & Asset Management	Taxes – Technical
NetClient CS Integration with the CS Professional Suite	11/11/20 7:00 AM	100 Minutes	During this session, we will explore how to integrate NetClient CS Portals with Practice CS, UltraTax CS, Accounting CS Payroll (ESS), and FileCabinet CS. This session is recommended for firms that are new to NetClient CS and looking to integrate NetClient CS Portals with the CS Professional Suite.	Upon completion of this session, you will be able to: Integrate NetClient CS Portals with Practice CS, UltraTax CS, Accounting CS Payroll, and FileCabinet CS.	No pre-requisites	Any User	Intermediate	2	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Strategic Planning: Generating Revenue and Capacity Projections	11/11/20 7:00 AM	100 Minutes	In this session we will take the information from Practice CS Staff management, project management and reporting and translate it to powerful data. This data will be utilized in an excel spreadsheet, which will be provided to participants, to help make strategic decisions regarding staffing and project revenue.	Upon completion of this session, you will be able to: • Setup and utilize the Practice CS modules for capacity planning • Run the provided custom Practice CS report along with setup to pull revenue projection numbers • Determine if you have enough staff, too much or too little resources and determine a course of action	Participants should have a working understanding of the setup of Practice CS.	Any User	Advanced	2	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Advising Clients Who Can't Pay Their Taxes	11/11/20 8:00 AM	50 Minutes	In this session, you'll learn ways to proactively help clients who can't pay their taxes.	Upon completion, you'll be able to: • Help clients apply for a short-term online payment agreement • Request an installment agreement • File an offer in compromise • Ask the IRS to delay collection • Identify other options	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Federal Tax Research on Checkpoint Edge	11/11/20 8:00 AM	50 Minutes	In this session, you will learn how to find answers to your federal tax questions faster than ever before. You will see how to use predictive technology and concept markers to improve the quality and precision of your query even when you aren't sure what keywords to use or related topics you might need to	Upon completion of this session, you will be able to: • Use links on the main screen to browse materials, get to tools, and more • Take advantage or predictive queries • Filter search results • Use Concept Markers to focus your search • View results from trusted public sites	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
How to Effectively Run a Virtual Meeting	11/11/20 8:00 AM	50 Minutes	Running an in-person meeting isn't applies to aples to running a virtual meeting. Learn how to prepare, manage and engage your audience to deliver an effective virtual meeting.	Upon completion of this session, you will be able to: learn tips and tricks to ensure your virtual meetings accomplish your goals while fostering active participation.	No pre-requisites	Any User	Basic	1	Trends in the Profession	Communications and Marketing – Non-Technical
Implementing Bank Feeds to Better Connect with Business Clients	11/11/20 8:00 AM	50 Minutes	In this session, you will learn how to link Accounting CS Bank Feeds to your client's financial account to save time and increase productivity during data entry and bank account reconciliation.	Upon completion of this session, you will be able to: • Invite your clients to link their bank accounts to your accounting software • Use the Bank Feeds Dashboard to import transactions directly from a client's bank account • Categorize imported bank transactions to vendors and general ledger accounts • Import electronic bank statements • Have your clients retrieve their own transactions through Bank Feeds within Client Access	A participant should be knowledgeable about processing a client for bookkeeping services.	Any User	Intermediate	1	Accounting	Accounting – Technical
Remote Auditing: How Firms of the Future are Using Info to Conduct Their Engagements Remotely	11/11/20 8:00 AM	50 Minutes	In this session, you will see how other firms are using Info to conduct their audits remotely in today's environment. We will discuss why the accounting industry is trending towards conducting engagements remotely, the benefits of remote auditing for you firm and your clients, and how Info enables your firm to be a firm of the future. Participants should be familiar with the overall concept of how to perform an audit engagement.	Upon completion of this session, you will be able to: • Have an understanding of why the accounting industry is trending towards remote auditing • Know how to overcome common challenges that firms face when trying to conduct an audit engagement remotely • Have an understanding of the benefits to both the firm and the firm's clients of conducting an audit remotely • Know the components of Info and how each component is used for a remote audit • Know the next steps to take so that your firm can be a firm of the future and not get left behind	No pre-requisites	Any User	Intermediate	1	Auditing	Auditing – Technical

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Workpapers CS Formatting Tools with Microsoft Word and Excel	11/11/20 8:00 AM	50 Minutes	In this session, you will learn about the Workpapers CS formatting tools available within Microsoft Word and Excel to modify and create financial statements and client letters.	Upon completion of this session, you will be able to: • Link account groupings in Workpapers CS to a Word or Excel document • Learn the formatting best practices • Learn about the Workpapers CS ribbon in Word and Excel • Format a Balance Sheet in Excel • Format a Client Letter in Word	A participant should be familiar with setting up a client in Workpapers CS.	Any User	Advanced	1	Accounting	Computer Software & Applications – Non-Technical
Payroll Tax Compliance: 2020 and 2021 Legislative Update	11/11/20 9:00 AM	50 Minutes	In this session, we will discuss several topics you need to know to prepare for year-end processing, as well as the latest in federal and state payroll changes and proposals for 2021. If you offer payroll services, you won't want to miss this session.	Upon completion of this session, you will be able to: • Understand the latest tax reform items that affect payroll including: 2020-2021 federal budget proposals, Taxpayer First Act, Truncated W-2s and new requirements to box 14, 1099-NEC & 1099-MISC, ACA/AHA requirements for employers and Cybersecurity • Discover new IRS initiatives, payroll reconciliation, Covid-19 Legislation, state withholding, new hire reporting, escheat rules, unemployment and deficit states, state sick pay, fringe benefits, and more • Discuss topics related to the 2020-2021 W-4, including the impact at federal and state levels. • Utilize tips to make year-end processing more efficient and effective	No pre-requisites	Any User	Overview	1	Payroll	Taxes – Technical
Consolidated and Unitary Business Returns in UltraTax CS	11/11/20 9:00 AM	75 Minutes	In this session, you will learn about consolidated return functionality in UltraTax CS, including consolidated and unitary state returns.	Upon completion of this session, you will be able to: • Prepare consolidated tax returns in UltraTax CS • Identify which states support consolidated tax returns • Take advantage of Data Sharing to prepare Unitary state filings • File consolidated returns electronically	A participant should be familiar with UltraTax CS, or have taken UltraTax CS 1120 Preparation	Any User	Advanced	1.5	Tax & Asset Management	Taxes – Technical
GoFileRoom: What's New	11/11/20 9:00 AM	75 Minutes	In this session we will discuss the newest features in GoFileRoom and FirmFlow as well as providing insight into the future roadmap.	Upon completion of this session, you will be able to: • Updated interface and new search capabilities • Overview of new options	No pre-requisites	Any User	Overview	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
GoSystem Tax RS: Getting the Most with Common State	11/11/20 9:00 AM	75 Minutes	In this session learn about common state functionality, troubleshooting, and what the rebuild process does for your locators. This session is recommended for those who are newer to GoSystem Tax RS. Participants should be familiar with GoSystem Tax RS.	Upon completion of this session, you will be able to: • Troubleshoot common state • Rebuild a locator • Understand functionality of common state	No pre-requisites	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Advanced Accounting Services Using Accounting CS	11/11/20 9:00 AM	100 Minutes	In this session, we'll go beyond the basics to demonstrate the powerful, more intricate features of Accounting CS when it comes to the clients you provide bookkeeping services to.	Upon completion of this session, you will be able to: • Setup consolidated clients • Integrate with UltraTax CS and Fixed Assets CS • Create transaction templates and automate entries • Utilize account segments for complex chart of accounts	A participant should be familiar with setting up a client and accounting processing in Accounting CS prior to taking this session.	Any User	Advanced	2	Accounting	Accounting – Technical
COVID-19 Relief and Its Tax Implications Using UltraTax CS	11/11/20 9:00 AM	100 Minutes	This session will dive into tax changes driven by the CARES act and other Covid-19 relief. We will begin with an overview of the changes, followed by specific data entry examples.	Upon completion of this session, you will be able to: • Understand tax changes related to COVID-19 and the CARES act • Prepare tax returns affected by COVID-19 relief using UltraTax CS	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Advanced	2	Tax & Asset Management	Taxes – Technical
Moving Your Practice Forward	11/11/20 9:00 AM	100 Minutes	How are you getting paid for the value (e.g., ideas, strategies, and solutions) you bring to your clients separate from the physical compliance deliverables? How are you defining the clarity and setting the proper expectations in your client relationships? How are you creating highly duplicable services to help your clients reach their financial goals and aspirations? Join us for a Practice Forward discussion where you'll learn how to take steps to enhance clarity in client relationships, improve margins, and create a progressive set of new client services that extend beyond compliance work. We will share our consulting experiences with planning and executing a business model shift, including aligning staff, identifying monetizable new client services, adopting supportive technology and workflow, and much more. It's all part of the journey to building a firm that offers higher value to clients, operates in a more sustainable business model, and generates a healthier bottom line. Learn how to become a	Upon completion of this session, you will be able to: identify new uses for Onvio Advisory to enhance your practice's advisory services and deepen relationships with your clients.	No pre-requisites	Any User	Overview	2	Advisory	Business Management & Organization – Non-Technical
Project Management for Assurance Engagements	11/11/20 10:00 AM	50 Minutes	This session will discuss the challenges in managing our clients, internal barriers, and describe best practices in project management.	Upon completion of this session, you will be able to: • List ideas for how to improve your client management and project wrap up • Describe ways to get more PBC items from your clients in a timely manner • Identify strategies to work better as a team, including getting reviews done more timely	Participants should have a working knowledge of how poorly some audits are executed.	Any User	Intermediate	1	Auditing	Auditing – Technical
Filling Your People Pipeline	11/11/20 12:00 PM	50 Minutes	Finding talent is no longer as easy as it used to be. How do you interview to hire the intern or experienced staff that will be the best fit for your firm? This session will focus on interview skills, intern finding and keeping if they are worth it, and methods to find that unicorn, the experienced staff who will bring value to your firm and the firm's culture.	Upon completion of this session, you will be able to: • Learn interview techniques to spot and hire the ones that will fit your firm • Learn how to seek out interns and staff and onboard them with success for a future	No pre-requisites	Any User	Intermediate	1	Trends in the Profession	Personnel/Human Resources – Non-Technical
Peer Review Insights	11/11/20 12:00 PM	50 Minutes	This session will introduce and discuss the current environment of peer review including the current focus of peer reviewers and recent common deficiencies and matters for further consideration.	Upon completion of this session, you will be able to: • List the 2020 topics that are the current focus of peer reviewers • Identify ways to avoid such comments on your next peer review • Share ideas with other members of your engagement teams	Participants should have a working knowledge of audits and previous areas of peer review discussions in their firms.	Any User	Intermediate	1	Auditing	Auditing – Technical
The IRS is Worried About Bitcoin – Why You Should Be, Too	11/11/20 12:00 PM	50 Minutes	In this session, you'll discover why the IRS is laser-focused on policing virtual currency transactions.	Upon completion, you'll be able to: • Explain the federal income tax consequences of virtual currency transactions • Summarize recent IRS enforcement activities • Advise clients on how they can meet their compliance obligations	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
GoSystem Tax RS: 1065 and Special Allocations	11/11/20 12:00 PM	75 Minutes	In this session learn about how special allocations can be utilized in GoSystem Tax RS, common questions, state allocations, and different ways to allocate information on the 1065 returns. Participants should be familiar with 1065	Upon completion of this session, you will be able to: • Specially allocate items on the Federal and State returns • Import special allocation codes • Understand how allocations are designed	No pre-requisites	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Microsoft Outlook for Accounting Professionals	11/11/20 12:00 PM	75 Minutes	In this session, we will discuss how you can take your knowledge of Microsoft Outlook to a whole new level! You'll walk away with several quick solutions that will make you more efficient. If you're new to Outlook, or have been using Outlook for years, you won't want to miss this session!	Upon completion of this session, you will be able to: • Take advantage of Outlook's advanced email, calendar, and task functions • Create and use templates to drastically reduce time • Identify how to clean up your inbox by scheduling emails as calendar appointments or tasks	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1.5	Technology	Computer Software & Applications – Non-Technical
Onvio Tax & Fixed Assets: Tax Workflow Preview	11/11/20 12:00 PM	75 Minutes	Interested in discovering a newer and better tax workflow for your firm? One that is completely digital, has the capacity to interact with your clients, and provides you and your staff with access to numerous ways to integrate, automate, and add intelligence to your workflow? Meet the preeminent cloud-based tax workflow of today and tomorrow with Onvio Tax & Fixed Assets at the center. This session will unveil a host of exciting new capabilities as well as jurisdictional filing support available in Onvio Tax & Fixed Assets for the upcoming tax season. We will showcase the progress that has been made in the system designed to bring efficiency and add value to your firm's tax workflow.	Upon completion of this session, you will be able to: • Understand how Onvio Tax & Onvio Fixed Assets benefit from living within the overall Onvio ecosystem • See various tax workflow examples in action using Onvio Tax and Onvio Fixed Assets • Identify emerging and enabling technologies firms must consider in order to avoid an outdated tax workflow	No pre-requisites	Any User	Overview	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical
Leveraging the Best Features and Functions of UltraTax CS	11/11/20 12:00 PM	100 Minutes	Have you ever learned something new in UltraTax CS and wondered, "Hmm, I wonder how long that's been there?" Are you concerned that you may be missing other tools that can help you boost efficiency? In this fast paced session, we will review some of the most impactful workflow enhancements to UltraTax CS over the past several years, and review features that many preparers are not	Upon completion of this session, you will be able to: • Implement these time-saving features to boost productivity at your firm	A participant must have a working knowledge of UltraTax CS.	Any User	Overview	2	Tax & Asset Management	Taxes – Technical
Power Apps – Enabling Integration with Other Apps	11/11/20 12:00 PM	100 Minutes	In this session we will introduce Microsoft Power Apps. We will discuss using the GoFileRoom connector within Power Apps. You will also hear example use cases for using Microsoft Power Apps with GoFileRoom.	Upon completion of this session, you will be able to: • Create a Canvas App within Microsoft Power App • Understand the difference between Canvas vs Model Driven Power Apps • Understand how to use the GoFileRoom Connector • Understand different use cases for using Microsoft Power Apps with GoFileRoom	This session is recommended for firms that use GoFileRoom. A participant should be familiar with the concept of APIs (application programming interface).	Any User	Advanced	2	Technology	Computer Software & Applications – Non-Technical

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Streamlining Individual Tax Workflow with Workpapers CS	11/11/20 12:00 PM	100 Minutes	This lecture-style session will focus on the use of Workpapers CS to gather, manage, and process your individual tax Workpapers.	Upon completion of this session, you will be able to: • Use the source document processing (OCR) feature • Work with tax binders • Insert client source documents • Create notes for source documents • Signoff on documents • Wrap-up a tax engagement • Roll an Engagement Binder forward • Learn about Source Document Processing options that allows for grouping of brokerage statements and K-1s along with sorting options and custom folder creation when organizing source documents • Populate clients from UltraTax CS • Integrate Workpapers with NetClient CS File Exchange and Onvio for direct download of client files	A participant should be familiar with the setup of a client in Workpapers CS and navigating the application.	Any User	Intermediate	2	Accounting	Taxes – Technical
Integrations Enable the End-to-End Digital 1040 Tax Return	11/11/20 1:00 PM	50 Minutes	In this session, you'll see how firms use SurePrep's integration with UltraTax CS, GoSystem Tax RS, GoFileRoom, and FirmFlow to prepare a completely digital 1040 tax return. We'll discuss how a digital process reduces friction, increases profitability, and improves the client experience.	Upon completion of this session, you will be able to: • Create TaxCaddy Document Request Lists from GoSystem Tax RS and UltraTax CS • Pull in source docs from GoFileRoom • Export OCR'd data back to GoSystem Tax RS and UltraTax CS • Update FirmFlow for status changes in SurePrep's processing of a return • Store and retain final SPbinder workpapers into GoFileRoom	Participants should be familiar with UltraTax CS or GoSystem Tax RS.	Any User	Basic	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
Utilizing Batch Processing with Accounting CS Payroll	11/11/20 1:00 PM	50 Minutes	In this session, you will learn how to use batch processing to streamline your payroll businesses, from paychecks and reports to tax liability payments and filings. This session focuses leveraging capabilities in Accounting CS to maximize efficiencies and minimize errors.	Upon completion of this session, you will be able to: • Setup and leverage Complete Payroll Output to streamline processing of payrolls • Standardize procedures for reports, reporting, and checks • Execute best practices for timely payment of liabilities and establishing bank relationships • Leverage Accounting CS to maximize efficiencies in bulk filing of tax returns	A participant should have knowledge and experience on processing payroll in Accounting CS.	Any User	Advanced	1	Payroll	Taxes – Technical
Would Your Boss Be Comfortable With Asking You for a Loan?	11/11/20 1:00 PM	50 Minutes	78% of US workers are living paycheck to paycheck. Timing of payroll can cause employees to struggle with making ends meet. Many resort to requesting a payroll advance or short-term loan, placing them in an uncomfortable situation. Learn how on-demand pay and rapid! can empower your employees, and what unexpected results could benefit employers.	Upon completion of this session, you will be able to: • Why OnDemand pay today • A solution for retention and engagement • Key consideration for early wage accrual	No pre-requisites	Any User	Basic	1	Trends in the Profession	Personnel/Human Resources – Non-Technical
How did COVID-19 change your Practice Forward methodology?	11/11/20 1:00 PM	75 Minutes	In this session, you will hear how Paul Miller has adapted to working in new ways due to COVID-19. Paul will share changes implemented in technology, communications, the Two Meeting Approach, staffing considerations, client	Upon completion of this session, you will be able to implement some new strategies for working in new ways.	No pre-requisites	Any User	Overview	1.5	Advisory	Business Management & Organization – Non-Technical
How to Customize Practice CS Using Custom Fields for Your Firm	11/11/20 1:00 PM	75 Minutes	In this workshop, you'll see how other firms are taking advantage of the flexibility provided by the custom fields in Practice CS. We'll discuss innovative ways to track and centralize information to share with your entire firm. By taking advantage of the custom fields in Practice CS, your firm will gain efficiencies and new managing capabilities with your custom fields.	Upon completion of this workshop, you will be able to: • Uncover other ways firms are using custom fields • Centralize information to easily share with others in the office • Identify reporting capabilities with custom fields	Participants should be familiar with the setup in the Practice CS program.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
UltraTax CS 1120 Preparation	11/11/20 1:00 PM	75 Minutes	Learn how to prepare corporate tax returns including S-Corporation returns.	Upon completion of this session, you will be able to: • Demonstrate data entry of general client demographic information • Apportion net income to appropriate state returns as required • Demonstrate officer information and shareholder data entry when applicable • Prepare tax returns with ordinary business income and additional activities • Manage Fixed Assets information • Indicate and track Qualified Business Income (199A) • Demonstrate balance sheet and Schedules M-1 and M-2	A participant should be familiar with basic UltraTax CS navigation.	Any User	Basic	1.5	Tax & Asset Management	Taxes – Technical
2020 Lookback Beyond Covid-19 (Tax Update)	11/11/20 2:00 PM	50 Minutes	While 2020 has been an unprecedented year as a result of a pandemic, there have been numerous tax law updates impacting key areas of U.S. taxation. From notices and administrative releases to revenue rulings and judicial developments, this session discusses the most relevant enactments and tax legislative activity aside from Covid-19 impacting the tax landscape.	Upon completion of this session, you will be able to: • Describe many of the 2020 key legislative provision impacting business and individuals that were enacted outside of the CARES & SECURE Act.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
FileCabinet CS Tips for Archiving and Performance Management	11/11/20 2:00 PM	50 Minutes	In this session, you will learn best practices for archiving to increase performance in FileCabinet CS.	Upon completion of this session, you will be able to: • Create, delete, restore, and append an archive • Prepare FileCabinet CS data for migration • Troubleshoot performance-related issues with FileCabinet CS	A participant should have a working knowledge of FileCabinet CS	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Processing Direct Deposit Payroll with Kotapay through Accounting CS Payroll	11/11/20 2:00 PM	50 Minutes	In this session you will learn how Kotapay integrates with Accounting CS for ACH processing. You will also learn why direct deposit payroll is more important than ever, the benefits of working with Kotapay and how to manage risks when processing payroll. You will also hear from a long-time Accounting CS user who is taking advantage of this integration and will share how this works for their firm.	Upon completion of this session, you will be able to: • Walk away with a blue print for adding payroll services • Leverage the integration between Kotapay and Accounting CS • Learn to identify fraud and red flags when processing payroll	No pre-requisites	Any User	Intermediate	1	Payroll	Computer Software & Applications – Non-Technical
Time-Saving Tips on Federal Tax Research in Checkpoint	11/11/20 2:00 PM	50 Minutes	In this session, you will learn functionality tips, tricks, shortcuts, and hidden gems that will save you research time. The content covered includes features from common functionality questions, or features that get the biggest "ooohs" and "aaahs" when we show them.	Upon completion of this session, you will be able to: • Use Answer Path as a shortcut to finding answers • Locate Quick Tax Amounts • Use a Topical Index • Take advantage of tips that can be used when in a Code Section • Perform a search using Form/Line Finder • Navigate to prior regs and treasury decisions	Participants should have a working knowledge of Checkpoint.	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
What's New in Onvio Firm Management	11/11/20 2:00 PM	50 Minutes	Check out the added features and improvements that have been released in Onvio Firm Management in the last year, including key tax workflow integrations with UltraTax CS. Also, spend some time reviewing features designed to save you time and effort in your workflow.	Upon completion of this session, you will be able to: • Understand the difference between Onvio Firm Management Essentials and Advanced • Identify recent enhancements to Onvio Firm Management • Understand how these features may benefit your firm and clients	No pre-requisites	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
What's New in UltraTax CS	11/11/20 2:00 PM	50 Minutes	In this session, you'll get a jump on next tax season with a preview of new and powerful system-wide, entity-specific, and workflow improvements to UltraTax CS. Join us to understand how the new release impacts your firm and get the most productivity from your UltraTax CS Software	Upon completion of this session, you will be able to: • Use new program features • Understand entity-specific changes for up-to-date tax forms	No pre-requisites	Any User	Overview	1	Tax & Asset Management	Taxes – Technical
NetClient CS Portals Integration with GoFileRoom	11/11/20 4:00 PM	50 Minutes	During this session, we will explore how NetClient CS Portals integration with the GoFileRoom. This session is recommend for Firms that are working with NetClient CS portals and GoFileRoom. A participant should be familiar with navigating within NetFirm CS and the GoFileRoom.	Upon completion of this session, you will be able to: Link NetClient CS Portals with Clients in GoFileRoom, and understand the integration between NetClient CS Portals and GoFileRoom.	No pre-requisites	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Top 10 Microsoft Excel Tips for Accounting Professionals	11/11/20 4:00 PM	50 Minutes	In this session, we will discuss how you can be more efficient with Microsoft Excel. Do you consider yourself proficient with Excel but not an expert? You won't want to miss this session!	Upon completion of this session, you will be able to: • Apply 10 quick tips to bring greater efficiency to using Microsoft Excel • Identify how to easily navigate, utilize timesaving functions • Apply consistent formatting • Customize the status bar	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1	Technology	Computer Software & Applications – Non-Technical
Client-Facing Tools to Better Serve Your Payroll Clients in a Remote Environment with Accounting CS	11/11/20 4:00 PM	75 Minutes	In this session, you will learn how to utilize tools available to your payroll clients for direct integration with Accounting CS while navigating a remote work environment.	Upon completion of this session, you will be able to: • Setup and use the Remote Payroll feature for clients to input their employees' payroll check hours and amounts • Update employee W-4 information and review check stubs and payroll tax forms through Employee Self-Service • Enable employees to enter time via the Employee Time Entry process • Use Client Access to allow clients direct access to payroll entry and payroll data in the Accounting CS application	A participant should be familiar with how to process payroll in Accounting CS.	Any User	Intermediate	1.5	Payroll	Computer Software & Applications – Non-Technical
Divisions, Consolidated, and Fund engagements in AdvanceFlow	11/11/20 4:00 PM	75 Minutes	In this session, you will learn how to effectively use divisions, consolidated, and fund engagements in AdvanceFlow.	Upon completion of this session, you will be able to: • Setup and utilize divisional engagements in AdvanceFlow • Create consolidated engagements • Utilize the fund structure to create and work within engagements	A participant should be familiar navigating in AdvanceFlow in the trial balance area.	Any User	Advanced	1.5	Auditing	Auditing – Technical
What's New With Onvio Advisory	11/11/20 4:00 PM	75 Minutes	In this session, we will showcase Onvio Advisory, an exciting new product designed to provide firms with assistance in providing their clients with various types of Advisory services. With the popular Practice-Forward program inspiring much of the work done in Onvio Advisory, this new application combines capabilities as originally found in Planner CS and ToolBox CS with new technology and methodology available today. And with incorporating integration with popular Checkpoint research, guidance and tools, Onvio Advisory is sure to	Upon completion of this session, you will be able to: • Understand Onvio Advisory and what it can accomplish for a firm • Walkthrough examples of various Advisory-based requests a firm faces and how Onvio Advisory provides an efficient solution • Witness how Onvio Advisory and Checkpoint integration provides a firm with unprecedented value	No pre-requisites	Any User	Intermediate	1.5	Advisory	Computer Software & Applications – Non-Technical
GoSystem Tax RS: Utilizing Self-Service Resources and Best Practices	11/11/20 4:00 PM	100 Minutes	In this session, we will learn about the self-service resources within GoSystem Tax RS, as well as various best practice tools within the software. Participants should understand the GoSystem Tax RS program.	Upon completion of this session, you will be able to: • Use the self-service resources built into GoSystem Tax RS • Track milestones • Track time • Complete tasks	No pre-requisites	Any User	Intermediate	2	Tax & Asset Management	Computer Software & Applications – Non-Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Power Apps – Enabling Integration with Other Apps	11/11/20 4:00 PM	100 Minutes	In this session we will introduce Microsoft Power Apps. We will discuss using the GoFileRoom connector within Power Apps. You will also hear example use cases for using Microsoft Power Apps with GoFileRoom.	Upon completion of this session, you will be able to: • Create a Canvas App within Microsoft Power App • Understand the difference between Canvas vs Model Driven Power Apps • Understand how to use the GoFileRoom Connector • Understand different use cases for using Microsoft Power Apps with GoFileRoom	This session is recommended for firms that use GoFileRoom. A participant should be familiar with the concept of APIs (application programming interface).	Any User	Advanced	2	Technology	Computer Software & Applications – Non-Technical
Security in a Mobile World	11/11/20 4:00 PM	100 Minutes	Mobile security is a top concern moving forward for companies and for good reason. With more employees now working remotely and accessing firm data from smart devices, keeping sensitive information safe has become more difficult	Join our session as we discuss: • Mobile security vs. cloud security • Trending security attacks • What companies can do	No pre-requisites	Any User	Overview	2	Security	Information Technology – Technical
Streamlining Business Tax Workflow Using Trial Balance Tools for Accounting CS and Workpapers CS	11/11/20 4:00 PM	100 Minutes	In this session, you will learn about time-saving features in Accounting CS and Workpapers CS that speed year end processing for your business clients.	Upon completion of this session, you will be able to: • Add a client's chart of accounts and account balances via Excel spreadsheet import • Identify and assign tax coding for integration with UltraTax CS using account grouping and standard account mapping • Import depreciation journal entries from Fixed Assets CS • Print a set of financial statements • Utilize the Analyze Client Activity on-screen review tool • Integrate the trial balance with UltraTax CS • Enter Tax Code Adjustments (tax reconciliation)	A participant should be familiar with navigating the Accounting CS application, and have knowledge on UltraTax CS and Fixed Assets CS.	Any User	Intermediate	2	Accounting	Taxes – Technical
TCJA: An Evolving Situation Using UltraTax CS	11/11/20 4:00 PM	100 Minutes	Signed in 2017, the Tax Cuts and Jobs Act brought sweeping changes to federal tax policy, as well as changes to states with decoupling modifications. In this session, we will review how changes related to TCJA and Section 199A continue to evolve.	Upon completion of this session, you will be able to: • Understand continued changes related to TCJA • Navigate UltraTax CS to prepare returns affected by these changes	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Advanced	2	Tax & Asset Management	Taxes – Technical
UltraTax CS Workflow Best Practices	11/11/20 4:00 PM	100 Minutes	Attending this session will help you understand best practices for an efficient, optimized UltraTax CS workflow. A consultant specialized in UltraTax CS will discuss the preparation process from the beginning to the end of the tax engagement, with a focus on the UltraTax CS Status System	Upon completion of this session, you will be able to: • Establish custom client status events • Determine the status of tax returns on an office-wide or more focused basis • Optimize your UltraTax CS Workflow	A participant should be familiar with preparing returns in UltraTax CS	Any User	Intermediate	2	Tax & Asset Management	Computer Software & Applications – Non-Technical
Onvio 2020 Update	11/11/20 5:00 PM	75 Minutes	Come and see the latest tax and accounting web-based software, Onvio! We will review the Onvio platform and applications that are available today along with what's on the horizon. Take a look back on how this cloud-based platform has been designed for the tax and accounting professional using the latest technology. And, find out how to prepare your firm to move from the desktop to	Upon completion of this session, you will be able to: • Understand the vision and the value of the Onvio platform • Know what applications are available within the Onvio platform • Update your firm on the benefits and expectations of moving to Onvio from a desktop application	No pre-requisites	Any User	Overview	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
The Right Stuff: Transitioning Your Practice to Have The Right Relationships	11/11/20 5:00 PM	75 Minutes	In this session, you will hear how Brittany Lanphier has successfully transitioned her practice to include the right clients and the right relationships. Brittany will discuss her strategy, steps for transitioning, and what this has done for her practice. Brittany will discuss how she transitioned her client base to maintenance packages with clearly defined scope of work and a fixed recurring billing amount. Brittany will share the challenges she faced and how she overcame those challenges while implementing Practice Forward	Upon completion of this session, you will be able to implement some new strategies for working with your clients to increase revenue, reduce accounts receivables, and increase client satisfaction.	No pre-requisites	Any User	Overview	1.5	Advisory	Business Management & Organization – Non-Technical
Business Tax CARES Act Provisions – What's New	11/11/20 6:00 PM	50 Minutes	On March 27, 2020, President Trump signed the "Coronavirus Aid, Relief, and Economic Security Act" (CARES Act) into law. In addition to several key individual tax provisions, this law – which marks the single largest economic stimulus package in history – includes substantive tax legislation impacting businesses and business entity returns. This session highlights the enacted tax provisions affecting businesses such net operating loss ("NOL") carrybacks, employee retention credits, payroll tax deferrals, modification of the interest expense limitations and technical amendments regarding qualified improvement property. Participants and attendees will be equipped to navigate the new pronouncements and legislation for purposes of filing 2020 business entity	Upon completion of this session, you will be able to: • Describe key business tax provisions in the recently enacted CARES Act, which provides economic relief and support for businesses and individuals impacted by the Coronavirus pandemic. • Describe the delayed payment of employer payroll taxes • Identify key characteristics of the modifications associated with the limitation of business interest • Review the technical amendments regarding qualified improvement property • Distinguish and identify the various rules of how to obtain carryback relief of certain business losses.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
How to Transition & Work in the NEW Browser Independent Version of AdvanceFlow & Checkpoint Engage	11/11/20 6:00 PM	50 Minutes	This session will introduce the new browser independent AdvanceFlow and Checkpoint Engage. This includes the process of converting from Internet Explorer to the new browser independent version.	Upon completion of this session, you will be able to: • Review trial balance differences between the two browsers • Set up new engagements • Add workpapers including Checkpoint Engage • Integrate AdvanceFlow and/or Checkpoint Engage in the new browser • Add workpapers including Checkpoint Engage • Identify and assess risks • Review/modify audit programs • Complete procedural and document level sign-offs • Utilize Linkage View • Add Workpaper Reference Links • Customize and Complete Disclosure Checklist	Participants should have a working knowledge of AdvanceFlow and Checkpoint Engage.	Any User	Intermediate	1	Auditing	Computer Software & Applications – Non-Technical
Implementing Bank Feeds to Better Connect with Business Clients	11/11/20 6:00 PM	50 Minutes	In this session, you will learn how to link Accounting CS Bank Feeds to your client's financial account to save time and increase productivity during data entry and bank account reconciliation.	Upon completion of this session, you will be able to: • Invite your clients to link their bank accounts to your accounting software • Use the Bank Feeds Dashboard to import transactions directly from a client's bank account • Categorize imported bank transactions to vendors and general ledger accounts • Import electronic bank statements • Have your clients retrieve their own transactions through Bank Feeds within Client Access	A participant should be knowledgeable about processing a client for bookkeeping services.	Any User	Intermediate	1	Accounting	Accounting – Technical
UltraTax CS Printing and Electronic Filing	11/11/20 6:00 PM	50 Minutes	This session provides information on tax return production, including delivering returns to your clients, creating and transmitting returns to taxing agencies, and retaining file copies of the return.	Upon Completion of this session, you will be able to: • Distinguish between and produce government, client, and preparer copies of tax returns • Produce extensions and print selected pages and reports • Apply watermarks and field masking • Create electronic files for tax returns and extensions • Transmit electronic files to taxing agencies and client tax returns and eSignature requests to client portals • Manage electronic filing status efficiently across the firm	A participant should have a working knowledge of UltraTax CS 1040, 1120, or 1065.	Any User	Basic	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
Cloud Security	11/12/20 7:00 AM	75 Minutes	As business needs have changed, cloud computing has become the normal way of working. Where does your company's cybersecurity responsibility end and the vendor's responsibility begin?	Attending this session will help you: • Recognize common misconceptions of "cloud security" and "security in the cloud" • Safely navigate your company's cloud computing needs to effectively grow your business	No pre-requisites	Any User	Overview	1.5	Security	Information Technology – Technical
Leverage Practice CS as a Firm Administrator	11/12/20 7:00 AM	75 Minutes	If you use Practice CS not only for your Practice Management tool but as your CRM, Project Management, Staff Management or a combination, as a part of the administration team it is your responsibility to maintain the database and ensure the accuracy of your data. Monthly and yearly processes will help you maintain a clean database, allowing to extract the reporting you are responsible to supply. This session will touch on different areas of the program to help the administration team ensure they are leveraging the data. From the initiation and termination of a client or staff member to year end cleanup that should be	Upon completion of this session, you will be able to: • Identify internal controls to ensure accurate data • Discover methods to track information • Discover how your administrator can manage utilizing real-time data in the program • Identify month end and year end firm procedures	Participants should have an understanding of their firms processes.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Onvio Tax & Fixed Assets: Tax Workflow Preview	11/12/20 7:00 AM	75 Minutes	Interested in discovering a newer and better tax workflow for your firm? One that is completely digital, has the capacity to interact with your clients, and provides you and your staff with access to numerous ways to integrate, automate, and add intelligence to your workflow? Meet the preeminent cloud-based tax workflow of today and tomorrow with Onvio Tax & Fixed Assets at the center. This session will unveil a host of exciting new capabilities as well as jurisdictional filing support available in Onvio Tax & Fixed Assets for the upcoming tax season. We will showcase the progress that has been made in the system designed to bring efficiency and add value to your firm's tax workflow.	Upon completion of this session, you will be able to: • Understand how Onvio Tax & Onvio Fixed Assets benefit from living within the overall Onvio ecosystem • See various tax workflow examples in action using Onvio Tax and Onvio Fixed Assets • Identify emerging and enabling technologies firms must consider in order to avoid an outdated tax workflow	No pre-requisites	Any User	Overview	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Individual Tax CARES Act Provisions – What's New	11/12/20 8:00 AM	50 Minutes	On March 27, 2020, President Trump signed the "Coronavirus Aid, Relief, and Economic Security Act" (CARES Act) into law. This law marks the single largest economic stimulus package in history and is intended to provide relief to the many businesses and individuals impacted by COVID-19. This session focuses on the enacted tax provisions affecting individuals such as the 2020 recovery rebates for individuals, early retirement fund distribution rules, RMD waivers, charitable contribution limitation modifications, and other relevant provisions. session participants will have the working knowledge to apply the CARE Act to individuals filings Form 1040 for the 2020 tax year.	Upon completion of this session, you will be able to: • Describe the various individual tax provisions associated with the CARES Act • Distinguish between key dates and limitations pertaining to net operating losses, carrybacks and other expense and loss provisions • Identify rules pertaining to retirement plan and IRA Penalty-Free Distributions	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Peer Review Insights	11/12/20 8:00 AM	50 Minutes	This session will introduce and discuss the current environment of peer review including the current focus of peer reviewers and recent common deficiencies and matters for further consideration.	Upon completion of this session, you will be able to: • List the 2020 topics that are the current focus of peer reviewers • Identify ways to avoid such comments on your next peer review • Share ideas with other members of your engagement teams	Participants should have a working knowledge of audits and previous areas of peer review discussions in their firms.	Any User	Intermediate	1	Auditing	Auditing – Technical
Proactive Management Tools for Accounting and Payroll services with Accounting CS	11/12/20 8:00 AM	50 Minutes	In this session, we will provide guidance to utilize tools in Accounting CS to effectively manage your teams.	Upon completion of this session, you will be able to: • Strategize new methods in which to utilize dashboards and reports • Understand how firm setup options can improve management of accounting and payroll engagements • Utilize firm-wide reports to better manage work • Manage alerts and notices to stay informed and prevent inaccuracies	Attendees should expect a focus on utilizing dashboards, reports and firm setup options to better manage your firm for both general ledger and payroll Firm owners, staff and administrators will all benefit from this session.	Any User	Intermediate	1	Accounting	Computer Software & Applications – Non-Technical
Mastering the Two Meeting Approach	11/12/20 8:00 AM	75 Minutes	Attending this session will help you utilize the Two Meeting Approach as part of your Practice Forward methodology. Two of our Practice Forward consultants will role play several scenarios including client rejections, giving away high level ideas, and piquing interest.	Upon completion of this session, you will be able to fine tune your skills using the Two Meeting approach.	No pre-requisites	Any User	Overview	1.5	Advisory	Business Management & Organization – Non-Technical
Researching From Within UltraTax CS	11/12/20 8:00 AM	75 Minutes	This session will help you understand the research tools available in UltraTax CS, including agency instructions and publications, as well as subscription-based resources from Checkpoint.	Upon completion of this session, you will be able to: • Access PPC Desksbooks from input screens for relevant tax guidance • Navigate from tax forms to instructions from taxing agencies as well as guidance from Form/Line Finder • Use shortcuts to access Checkpoint for additional web-based tools	A participant should be familiar with UltraTax CS	Any User	Overview	1.5	Tax & Asset Management	Taxes – Technical
NetClient CS Portals Integration with GoFileRoom	11/12/20 9:00 AM	50 Minutes	During this session, we will explore how NetClient CS Portals integration with the GoFileRoom. This session is recommend for Firms that are working with NetClient CS portals and GoFileRoom. A participant should be familiar with navigating within NetFirm CS and the GoFileRoom.	Upon completion of this session, you will be able to: Link NetClient CS Portals with Clients in GoFileRoom, and Understand the integration between NetClient CS Portals and GoFileRoom.	No pre-requisites	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Advanced Financial Statement Formatting Using the Accounting CS Report Designer	11/12/20 9:00 AM	75 Minutes	In this session, you will learn about advanced features within the Accounting CS Report Designer to further customize your clients' financial statements.	Upon completion of this session, you will be able to: • Customize date formats • Use conditional expressions to alter the output of variables • Create formulas for account groupings • Create departmental and location-based statements • Insert and format charts • Add variances and ratios to statements	A participant should be familiar with the bookkeeping processes within the application, and have experience modifying statements in the Report Designer.	Any User	Advanced	1.5	Accounting	Accounting – Technical
Audit Implications of COVID-19	11/12/20 9:00 AM	75 Minutes	This session will introduce and discuss various audit implications of COVID-19 including issues related to going concern, internal controls, fraud, and gathering evidence remotely.	Upon completion of this session, you will be able to: • List implications on upcoming audits of Covid-19 • Describe changes to going concern analyses and financial disclosures • Explain how changes in internal controls and additional fraud risks may exist for 2020 audits	A participant should have a working knowledge of audits and the virus.	Any User	Intermediate	1.5	Auditing	Auditing – Technical
Microsoft Teams for Accounting Professionals	11/12/20 9:00 AM	75 Minutes	Attending this session will help you to embrace Microsoft Teams as a powerful collaboration tool for your firm. Teams integrates the people, the content, and the tools your team needs to be more engaged and effective. Participants should have a working knowledge of Microsoft Office.	Upon completion of this session, you will be able to: • Define the difference between channels and teams • Schedule and manage (or conduct) meetings both internally and externally • Use Teams for individual and group chats • Easily navigate and utilize helpful functions like searching and bookmarking • Execute calls and screen sharing in the application • Adjust preferences and settings • Integrate with other applications	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1.5	Technology	Computer Software & Applications – Non-Technical
Communicating Results with Planner CS	11/12/20 9:00 AM	100 Minutes	Planner CS is an invaluable tool for tax professionals who build individual tax plans for their clients. In this session, you will learn best practices for creating client deliverables.	Upon completion of this session, you will be able to: • Design personalized client letters to summarize and reinforce important planning points • Create customized reports and report sets to efficiently produce client deliverables	A participant should have a working knowledge of using Planner CS.	Any User	Intermediate	2	Tax & Asset Management	Taxes – Technical
Leveraging the Best Features and Functions of UltraTax CS	11/12/20 9:00 AM	100 Minutes	Have you ever learned something new in UltraTax CS and wondered, "Hrm, I wonder how long that's been there?" Are you concerned that you may be missing other tools that can help you boost efficiency? In this fast paced session, we will review some of the most impactful workflow enhancements to UltraTax CS over the past several years, and review features that many preparers are not	Upon completion of this session, you will be able to: • Implement these time-saving features to boost productivity at your firm	A participant must have a working knowledge of UltraTax CS.	Any User	Overview	2	Tax & Asset Management	Taxes – Technical
Making Cybersecurity a Company Asset	11/12/20 10:00 AM	50 Minutes	Navigating your company's cybersecurity needs can be stressful for many reasons, including understanding how your clients and staff feel about security and how can security can help your company thrive.	Join us in this session to learn: • What practices are important for your company, now and tomorrow? • What you can do to promote security with staff and clients? • How to make cybersecurity work for you and your clients!	No pre-requisites	Any User	Overview	1	Security	Information Technology – Technical
Time-Saving Tips on Federal Tax Research in Checkpoint	11/12/20 10:00 AM	50 Minutes	In this session, you will learn functionality tips, tricks, shortcuts, and hidden gems that will save you research time. The content covered includes features from common functionality questions, or features that get the biggest "ooohs" and "aaahs" when we show them.	Upon completion of this session, you will be able to: • Use Answer Path as a shortcut to finding answers • Locate Quick Tax Amounts • Use a Topical Index • Take advantage of tips that can be used when in a Code Section • Perform a search using Form/Line Finder • Navigate to prior regs and treasury decisions	Participants should have a working knowledge of Checkpoint.	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Are You Taking Advantage of All the Features of Fixed Assets CS?	11/12/20 12:00 PM	50 Minutes	Attending this session will help you use Fixed Assets CS for more than just entering or disposing of assets. You will walk away from this session seeing how to use Fixed Assets CS in other ways, and learn about additional features the application has to offer	Upon completion of this session, you will be able to: • Apply underutilized features of Fixed Assets CS to boost your workflow efficiency	A participant should have a working knowledge of using Fixed Assets CS	Any User	Intermediate	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
Explore Employee Onboarding and Time Entry Integration with SwipeClock and Accounting CS	11/12/20 12:00 PM	50 Minutes	In this session, you will learn about the direct integration between SwipeClock and Accounting CS for employee time entry and employee onboarding.	Upon completion of this session, you will be able to: • Integrate with WorkforceHUB for employee onboarding • Use SwipeClock for employee time entry • Process payroll checks for SwipeClock clients	A participant should be familiar with how to setup payroll data and process payroll transactions in Accounting CS.	Any User	Advanced	1	Payroll	Computer Software & Applications – Non-Technical
How to Effectively Run a Virtual Meeting	11/12/20 12:00 PM	50 Minutes	Running an in-person meeting isn't applies to aples to running a virtual meeting. Learn how to prepare, manage and engage your audience to deliver an effective virtual meeting.	Upon completion of this session, you will be able to: learn tips and tricks to ensure your virtual meetings accomplish your goals while fostering active participation.	No pre-requisites	Any User	Basic	1	Trends in the Profession	Communications and Marketing – Non-Technical
The IRS Is Worried About Bitcoin – Why You Should Be, Too	11/12/20 12:00 PM	50 Minutes	In this session, you'll discover why the IRS is laser-focused on policing virtual currency transactions.	Upon completion, you'll be able to: • Explain the federal income tax consequences of virtual currency transactions • Summarize recent IRS enforcement activities • Advise clients on how they can meet their compliance obligations	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Using Teams, OneNote and Planner to Plan and Execute Audits	11/12/20 12:00 PM	50 Minutes	In this session, you will learn how to use Microsoft applications to help plan and execute audits. This session includes Microsoft Teams, OneNote, and Planner	Upon completion of this session, you will be able to: • Utilize Microsoft Teams for collaboration with colleagues • Setup checklists in OneNote to avoid commonly missed items • Use Planner to plan and execute audits	No pre-requisites	Any User	Intermediate	1	Auditing	Computer Software & Applications – Non-Technical
What's New in UltraTax CS	11/12/20 12:00 PM	50 Minutes	In this session, you'll get a jump on next tax season with a preview of new and powerful system-wide, entity-specific, and workflow improvements to UltraTax CS. Join us to understand how the new release impacts your firm and get the most productivity from your UltraTax CS Software	Upon completion of this session, you will be able to: • Use new program features • Understand entity-specific changes for up-to-date tax forms	No pre-requisites	Any User	Overview	1	Tax & Asset Management	Taxes – Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Utilizing Batch Processing with Accounting CS Payroll	11/12/20 1:00 PM	50 Minutes	In this session, you will learn how to use batch processing to streamline your payroll businesses, from paychecks and reports to tax liability payments and filings. This session focuses leveraging capabilities in Accounting CS to maximize efficiencies and minimize errors.	Upon completion of this session, you will be able to: • Setup and leverage Complete Payroll Output to streamline processing of payrolls • Standardize procedures for reports, reporting, and checks • Execute best practices for timely payment of liabilities and establishing bank relationships • Leverage Accounting CS to maximize efficiencies in bulk filing of tax returns	A participant should have knowledge and experience on processing payroll in Accounting CS.	Any User	Advanced	1	Payroll	Taxes – Technical
Mastering Remote Returns: Automating the Assembly, Delivery and eSign process	11/12/20 1:00 PM	50 Minutes	In this session, we will review how tax forms 1040, 1041, 1065, 1120 & 1120S can be assembled and delivered from home by staff, and clients can review and eSign remotely. In addition, you will see how K-1s can be electronically batch processed for delivery by the client, how to automate estimated payment reminders, and much more. We will also ensure you are up-to-date on the IRS	Upon completion, you'll be able to: • Streamline the electronic delivery of tax returns regardless of return type • Standardize reporting and tracking of tax returns • Shrink the assembly of tax returns • Understand how to electronically distribute K-1 to shareholders and partners	Participants should be familiar with the tax return assembly and delivery process.	Any User	Basic	1	Tax & Asset Management	Taxes – Technical
Consolidated and Unitary Business Returns in UltraTax CS	11/12/20 1:00 PM	75 Minutes	In this session, you will learn about consolidated return functionality in UltraTax CS, including consolidated and unitary state returns.	Upon completion of this session, you will be able to: • Prepare consolidated tax returns in UltraTax CS • Identify which states support consolidated tax returns • Take advantage of Data Sharing to prepare Unitary state filings • File consolidated returns electronically	A participant should be familiar with UltraTax CS, or have taken UltraTax CS 1120 Preparation	Any User	Advanced	1.5	Tax & Asset Management	Taxes – Technical
GoSystem Tax RS: Getting the Most with Common State	11/12/20 1:00 PM	75 Minutes	In this session learn about common state functionality, troubleshooting, and what the rebuild process does for your locators. This session is recommended for those who are newer to GoSystem Tax RS. Participants should be familiar with GoSystem Tax RS.	Upon completion of this session, you will be able to: • Troubleshoot common state • Rebuild a locator • Understand functionality of common state	No pre-requisites	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Reporting, Filtering and the Manage Screens in Practice CS	11/12/20 1:00 PM	75 Minutes	In this session you will learn when to use a report vs. realtime data on the manage screens in Practice CS. Dive deeper into filtering and nested filters and uncover how to manipulate data real time.	Upon completion of this session, you will be able to: • Create nested filters • Manipulate data on screen • Explain why to filter, group vs. detail reports by	Participants should have a working understanding of Practice CS.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
The Contactless Tax Return Using UltraTax CS	11/12/20 1:00 PM	75 Minutes	This session will demonstrate tax return workflow tools in UltraTax CS that can streamline tax preparation, including paperless and contactless workflow.	Upon completion of this session, you will be able to: • Use automatic data gathering through Web Client Tools, Source Document Processing, and more • Deliver drafts, final returns, and actionable items securely through client portals	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Overview	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical
Using Technology to Perform Trusted and Efficient Audits	11/12/20 1:00 PM	75 Minutes	With recent major frauds making headlines globally, it's more important than ever to perform a trustworthy audit. In this session, you'll see that one of the easiest ways to help do that is by using an electronic, third-party platform to confirm cash balances. Using this type of technology is now a recommended audit standard. In addition to providing trusted audit evidence, a platform like this also makes your audits easier. Each confirmation request is completed from start to finish online, and all of the information is stored year after year on the secure platform. You can also confirm more than just cash balances. Legal, AR/AP, and EBP (401k) confirmations can all be handled in the same platform.	Upon completion of this session, you will be able to: • Articulate why it's important to get a third-party confirmation every time you do an audit (risk mitigation) • Use the Confirmation platform to make your audits more efficient • Know how to do more than just cash confirmations in the platform LEVEL: Overview	No pre-requisites	Any User	Overview	1.5	Auditing	Auditing – Technical
Increase Advisory and Maintenance Revenue with Marketing	11/12/20 1:00 PM	100 Minutes	In this session, you will learn how to increase advisory and maintenance revenue with marketing as Mark Martukovich shares his strategies including LinkedIn, videos, blogs, social media, YouTube channels, and more! Attending this session will help you recognize the how, when, where, and with what of it all. Come learn what it takes to increase advisory and maintenance revenues with	Upon completion of this session, you will be able to: • Increase advisory and maintenance revenue • Identify marketing strategies for increasing advisory and maintenance revenue	No pre-requisites	Any User	Overview	2	Advisory	Business Management & Organization – Non-Technical
Presenting FirmFlow Data in Power BI	11/12/20 1:00 PM	100 Minutes	In this session we will introduce Microsoft Power BI. This session will be focused on using data from GoFileRoom / FirmFlow to create reports within Power BI. We will discuss using different Power BI Visualizations with your GoFileRoom	Upon completion of this session you will understand: • Navigation within Power BI • Creation of reports in Power BI • Visualizations within Power BI • Transforming data within Power BI • Publishing reports	This session is recommended for firms that use GoFileRoom and/or FirmFlow.	Any User	Advanced	2	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Tailoring Letters and Filing Instructions – Automatically Using UltraTax CS	11/12/20 1:00 PM	100 Minutes	Attending this session will help you use letters and filing instructions to their fullest potential. We will discuss using custom paragraphs and conditional formatting to tailor your client documents and provide clients with a more	Upon completion of this session, you will be able to: • Leverage custom paragraphs to include client-specific detail in letters automatically • Configure variables and print-if statements to personalize your client documents	A participant should have a working knowledge of UltraTax CS	Any User	Intermediate	2	Tax & Asset Management	Computer Software & Applications – Non-Technical
Advising Clients Who Can't Pay Their Taxes	11/12/20 2:00 PM	50 Minutes	In this session, you'll learn ways to proactively help clients who can't pay their taxes.	Upon completion, you'll be able to: • Help clients apply for a short-term online payment agreement • Request an installment agreement • File an offer in compromise • Ask the IRS to delay collection • Identify other options	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Using Agile Principles to Drive Innovation and Productivity with a Non-Development Team	11/12/20 2:00 PM	50 Minutes	Business Agility is a global industry trend. Thousands of organizations outside of the product development world have adopted Agile principles, enabling them to respond more quickly to both opportunities and threats. Organizations regardless of size or the work that they do gain value through Agility. Any business in today's virtual frontier and competitive market environment will benefit from an adaptive approach that is quick to rethink, react and constantly improve processes to deliver ultimate value for a new generation of customers.	Upon completion of this session, you will be able to: • Understand some core principles of Business Agility • Learn how to use aspects of Agile methods to drive innovation and productivity.	No pre-requisites	Any User	Basic	1	Trends in the Profession	Business Management & Organization – Non-Technical
GoSystem Tax RS What's New?	11/12/20 4:00 PM	75 Minutes	In this session you will learn about new features in GoSystem Tax RS for the upcoming 2020 tax year. This will assist your firm in processing returns efficiently for next year's tax season. Participants should have a working knowledge of GoSystem Tax RS.	Upon completion of this session, you will be able to: • Understand data entry changes within GoSystem Tax RS • Integrate K-1 Analyzer with GoSystem Tax RS locators • Utilize help resources to assist with understanding these changes	No pre-requisites	Any User	Overview	1.5	Tax & Asset Management	Taxes – Technical
Managing Your Projects in Practice CS	11/12/20 4:00 PM	75 Minutes	In this session discover how dashboards can help you manage your workload and track client work. Learn the differences and advantage to using the manage projects screen vs. a project management report.	Upon completion of this session, you will be able to: • Design project portlets • Apply filters and groupings • Identify different project reports for firm management	Participants should be familiar with the firm's projects and workflow.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Microsoft Outlook for Accounting Professionals	11/12/20 4:00 PM	75 Minutes	In this session, we will discuss how you can take your knowledge of Microsoft Outlook to a whole new level! You'll walk away with several quick solutions that will make you more efficient. If you're new to Outlook, or have been using Outlook for years, you won't want to miss this session!	Upon completion of this session, you will be able to: • Take advantage of Outlook's advanced email, calendar, and task functions • Create and use templates to drastically reduce time • Identify how to clean up your inbox by scheduling emails as calendar appointments or tasks	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1.5	Technology	Computer Software & Applications – Non-Technical
Use Checkpoint to Stay on Top of Tax Developments in an Ever-Changing Environment	11/12/20 4:00 PM	75 Minutes	In this session, you will learn what resources are available in Checkpoint to help keep you informed of tax law changes/guidance, including COVID-19 related client letters, tools, and analysis from our editors. Also, if there's an issue that is particularly important to you, you will learn how to schedule a search to run automatically and send you an email notification when there were changes or	Upon completion of this session, you will be able to: • Locate tax news updates, and request email delivery of them • View new law analysis • Locate client letters and tools related to new tax laws • Perform a keyword search and schedule it to run automatically on topics you want to monitor • Locate pending legislation for a code section, and see past changes	Participants should have a working knowledge of Checkpoint.	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Advanced Accounting Services Using Accounting CS	11/12/20 4:00 PM	100 Minutes	In this session, we'll go beyond the basics to demonstrate the powerful, more intricate features of Accounting CS when it comes to the clients you provide bookkeeping services to.	Upon completion of this session, you will be able to: • Setup consolidated clients • Integrate with UltraTax CS and Fixed Assets CS • Create transaction templates and automate entries • Utilize account segments for complex chart of accounts	A participant should be familiar with setting up a client and accounting processing in Accounting CS prior to taking this session.	Any User	Advanced	2	Accounting	Accounting – Technical
Communicating Results with Planner CS	11/12/20 4:00 PM	100 Minutes	Planner CS is an invaluable tool for tax professionals who build individual tax plans for their clients. In this session, you will learn best practices for creating client deliverables.	Upon completion of this session, you will be able to: • Design personalized client letters to summarize and reinforce important planning points • Create customized reports and report sets to efficiently produce client deliverables	A participant should have a working knowledge of using Planner CS.	Any User	Intermediate	2	Tax & Asset Management	Taxes – Technical
Connecting Accounting CS and QuickBooks	11/12/20 4:00 PM	100 Minutes	In this session, we'll introduce the QuickBooks import capabilities of Accounting CS and Accounting CS Payroll. This session is recommended for firms that would like to begin integrating QuickBooks data with Accounting CS and Accounting CS Payroll.	Upon completion of this session, you will be able to: • Evaluate the import workflows available from Intuit products, such as QuickBooks Pro and QuickBooks Online • Import chart of accounts and balances into Accounting CS • Import client setup and transactions into Accounting CS • Examine imported data and review the associated reports • Make modifications to imported data	A participant should be familiar navigating in Accounting CS and have experience working in QuickBooks.	Any User	Intermediate	2	Client Accounting	Accounting – Technical
COVID-19 Relief and Its Tax Implications Using UltraTax CS	11/12/20 4:00 PM	100 Minutes	This session will dive into tax changes driven by the CARES act and other Covid-19 relief. We will begin with an overview of the changes, followed by specific data entry examples.	Upon completion of this session, you will be able to: • Understand tax changes related to COVID-19 and the CARES act • Prepare tax returns affected by COVID-19 relief using UltraTax CS	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Advanced	2	Tax & Asset Management	Taxes – Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Moving Your Practice Forward	11/12/20 4:00 PM	100 Minutes	How are you getting paid for the value (e.g., ideas, strategies, and solutions) you bring to your clients separate from the physical compliance deliverables? How are you defining the clarity and setting the proper expectations in your client relationships? How are you creating highly duplicable services to help your clients reach their financial goals and aspirations? Join us for a Practice Forward discussion where you'll learn how to take steps to enhance clarity in client relationships, improve margins, and create a progressive set of new client services that extend beyond compliance work. We will share our consulting experiences with planning and executing a business model shift, including aligning staff, identifying monetizable new client services, adopting supportive technology and workflow, and much more. It's all part of the journey to building a firm that offers higher value to clients, operates in a more sustainable business model, and generates a healthier bottom line. Learn how to become a	Upon completion of this session, you will be able to: identify new uses for Onvio Advisory to enhance your practice's advisory services and deepen relationships with your clients.	No pre-requisites	Any User	Overview	2	Advisory	Business Management & Organization – Non-Technical
NetClient CS Integration with the CS Professional Suite	11/12/20 4:00 PM	100 Minutes	During this session, we will explore how to integrate NetClient CS Portals with Practice CS, UltraTax CS, Accounting CS Payroll (ESS), and FileCabinet CS. This session is recommended for firms that are new to NetClient CS and looking to integrate NetClient CS Portals with the CS Professional Suite.	Upon completion of this session, you will be able to: Integrate NetClient CS Portals with Practice CS, UltraTax CS, Accounting CS Payroll, and FileCabinet CS.	No pre-requisites	Any User	Intermediate	2	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Plan & Execute Audit Engagements Using the Thomson Reuters Cloud Audit Suite	11/12/20 4:00 PM	100 Minutes	In this session, you will learn how to effectively use the integration between AdvanceFlow and Checkpoint Engage for your audit engagements.	Upon completion of this session, you will be able to: • Setup new AdvanceFlow and Checkpoint Engage engagements • Import and filter trial balances • Create leadsheets and other custom reports • Identify and assess risks • Review/modify audit programs • Utilize Linkage View • Generate documents • Perform procedural and document-level sign-offs • Create Workpaper Reference Links • Customize and complete a Disclosure Checklist • Introduced to Info and Confirmation integration with the Cloud Audit Suite	No pre-requisites	Any User	Intermediate	2	Auditing	Auditing – Technical
Maximizing Staff Management Tools to Better Manage Workload Balance	11/12/20 6:00 PM	50 Minutes	Utilize Practice CS as a central staff management tool to integrate your projects, tasks and scheduled items in one calendar to leverage staff analysis reports. Understand how to set up targets work hours and budgets to maximize staff schedules and increase productivity.	Upon completion of this workshop, you will be able to: • Prioritize and rank assignments • Schedule projects and tasks loosely or exact on staff's calendars • Schedule by calendars or by items on a staff's list • Run staff capacity reports	A participant should be utilizing project management in Practice CS.	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Preparing Personal Property Returns in Fixed Assets CS and UltraTax CS	11/12/20 6:00 PM	50 Minutes	Attending this session will help you understand efficient preparation of personal (or "tangible") property tax returns using UltraTax CS and Fixed Assets CS. Within UltraTax CS, we will activate asset associations and use the reassign asset feature to create a PPT return using data already entered for depreciation. We will also look at time-saving tools in Fixed Assets CS that allow for efficient	Upon completion of this session, you will be able to: • Activate asset associations tailored to PPT return • Reassign existing assets • Configure Fixed Assets CS for efficient PPT data entry	A participant should be familiar with asset data entry in UltraTax CS. Participants do not need prior Fixed Assets CS experience.	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Remote Auditing: How Firms of the Future are Using Info to Conduct Their Engagements Remotely	11/12/20 6:00 PM	50 Minutes	In this session, you will see how other firms are using Info to conduct their audits remotely in today's environment. We will discuss why the accounting industry is trending towards conducting engagements remotely, the benefits of remote auditing for you firm and your clients, and how Info enables your firm to be a firm of the future. Participants should be familiar with the overall concept of how to perform an audit engagement.	Upon completion of this session, you will be able to: • Have an understanding of why the accounting industry is trending towards remote auditing • Know how to overcome common challenges that firms face when trying to conduct an audit engagement remotely • Have an understanding of the benefits to both the firm and the firm's clients of conducting an audit remotely • Know the components of Info and how each component is used for a remote audit • Know the next steps to take so that your firm can be a firm of the future and not get left behind	No pre-requisites	Any User	Intermediate	1	Auditing	Auditing – Technical
SECURE Act: How Protected Is Your Client's Retirement?	11/12/20 6:00 PM	50 Minutes	The Setting Every Community Up for Retirement Enhancement Act of 2019, better known as the SECURE Act, includes significant provisions aimed at increasing access to tax-advantaged accounts and preventing older Americans from outliving their assets. This session explores a number of rules related to tax-advantaged retirement accounts. After attending this session, participants should be able to describe the new rules regarding required minimum distributions, retirement plan inheritance, credits for retirement plan expenses, revised 401 (k) safe harbor provisions, and many more retirement related provisions.	Upon completion of this session, you will be able to: • Describe and outline the various retirement planning changes associated with the SECURE Act, and how advise client in light of such provisions.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
What's New in Onvio Firm Management	11/12/20 6:00 PM	50 Minutes	Check out the added features and improvements that have been released in Onvio Firm Management in the last year, including key tax workflow integrations with UltraTax CS. Also, spend some time reviewing features designed to save you time and effort in your workflow.	Upon completion of this session, you will be able to: • Understand the difference between Onvio Firm Management Essentials and Advanced • Identify recent enhancements to Onvio Firm Management • Understand how these features may benefit your firm and clients	No pre-requisites	Any User	Intermediate	1	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Workpapers CS Formatting Tools with Microsoft Word and Excel	11/12/20 6:00 PM	50 Minutes	In this session, you will learn about the Workpapers CS formatting tools available within Microsoft Word and Excel to modify and create financial statements and client letters.	Upon completion of this session, you will be able to: • Link account groupings in Workpapers CS to a Word or Excel document • Learn the formatting best practices • Learn about the Workpapers CS ribbon in Word and Excel • Format a Balance Sheet in Excel • Format a Client Letter in Word	A participant should be familiar with setting up a client in Workpapers CS.	Any User	Advanced	1	Accounting	Computer Software & Applications – Non-Technical
GoSystem Tax RS Letters and Filing Instructions	11/13/20 7:00 AM	50 Minutes	In this session you will learn how to customize your letters and filing instructions. This will help standardize your letters and instructions while also allowing flexibility to the prepares to include or exclude sections. Participants should have knowledge of GoSystem Tax.	Upon completion of this session, you will be able to: • Create sections • Utilize print conditions • Modify preparer options • Create advanced preparer options	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Computer Software & Applications – Non-Technical
Working with Net Operating Losses in UltraTax CS	11/13/20 7:00 AM	50 Minutes	In this session, you will get a refresher on Net Operating Loss Carryforwards and Carrybacks, including data entry to recalculate prior-year returns when necessary.	Upon completion of this session, you will be able to: • Enter prior-year carryover information into new clients • Process returns with a Net Operating Loss • Determine data entry to recalculate prior-year returns	A participant should have a working knowledge of UltraTax CS	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Data Security: Assessing the Risks in Your Office	11/13/20 7:00 AM	75 Minutes	In a mobile world, offices become much more than the bricks and mortar buildings that we have established. As more and more of your staff become remote, if they have not already, the less tangible control you have over your staff. With the rapid changes that were forced upon all of us, have you updated, or even discussed, your Information Security Plan? What new risks have been introduced to your business over the past year alone?	In this session, you will: • Learn about IRS-mandated requirements to safeguard taxpayer data • Identify and assess security risks to taxpayer information in relevant areas of your business operations • Learn how to practice a level of information security that fits for your size company	No pre-requisites	Any User	Overview	1.5	Security	Information Technology – Technical
GoFileRoom and FirmFlow for Other Departments	11/13/20 7:00 AM	75 Minutes	This session will cover ways to utilize GoFileRoom and FirmFlow in other areas of the firm. We will discuss ways to use workflows in assurance and HR.	Upon completion of this session, you will be able to: • Use workflows for assurance jobs • Use workflows for new staff onboarding • Use workflows for an annual review cycle • Manage personnel files in GoFileRoom	No pre-requisites	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Onvio 2020 Update	11/13/20 7:00 AM	75 Minutes	Come and see the latest tax and accounting web-based software, Onvio! We will review the Onvio platform and applications that are available today along with what's on the horizon. Take a look back on how this cloud-based platform has been designed for the tax and accounting professional using the latest technology. And, find out how to prepare your firm to move from the desktop to	Upon completion of this session, you will be able to: • Understand the vision and the value of the Onvio platform • Know what applications are available within the Onvio platform • Update your firm on the benefits and expectations of moving to Onvio from a desktop application	No pre-requisites	Any User	Overview	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Streamline Setup and Onboarding of New Payroll Clients in Accounting CS	11/13/20 7:00 AM	75 Minutes	In this session, you'll learn about the efficiency tools available in Accounting CS Payroll when onboarding new clients into the application.	Upon completion of this session, you will be able to: • Create client templates and use the Transfer Client Information feature to standardize the setup of your payroll clients • Use spreadsheet imports to setup employees and vendors • Configure employee templates to increase the efficiency of setting up employees • Prenote direct deposit information • Complete new hire reporting	No pre-requisites	Any User	Intermediate	1.5	Payroll	Computer Software & Applications – Non-Technical
What's New With Onvio Advisory	11/13/20 7:00 AM	75 Minutes	In this session, we will showcase Onvio Advisory, an exciting new product designed to provide firms with assistance in providing their clients with various types of Advisory services. With the popular Practice-Forward program inspiring much of the work done in Onvio Advisory, this new application combines capabilities as originally found in Planner CS and ToolBox CS with new technology and methodology available today. And with incorporating integration with popular Checkpoint research, guidance and tools, Onvio Advisory is sure to	Upon completion of this session, you will be able to: • Understand Onvio Advisory and what it can accomplish for a firm • Walkthrough examples of various Advisory-based requests a firm faces and how Onvio Advisory provides an efficient solution • Witness how Onvio Advisory and Checkpoint integration provides a firm with unprecedented value	No pre-requisites	Any User	Intermediate	1.5	Advisory	Computer Software & Applications – Non-Technical

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Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Business Tax CARES Act Provisions – What's New	11/13/20 8:00 AM	50 Minutes	On March 27, 2020, President Trump signed the "Coronavirus Aid, Relief, and Economic Security Act" (CARES Act) into law. In addition to several key individual tax provisions, this law – which marks the single largest economic stimulus package in history – includes substantive tax legislation impacting businesses and business entity returns. This session highlights the enacted tax provisions affecting businesses such net operating loss ("NOL") carrybacks, employee retention credits, payroll tax deferrals, modification of the interest expense limitations and technical amendments regarding qualified improvement property. Participants and attendees will be equipped to navigate the new pronouncements and legislation for purposes of filing 2020 business entity	Upon completion of this session, you will be able to: • Describe key business tax provisions in the recently enacted CARES Act, which provides economic relief and support for businesses and individuals impacted by the Coronavirus pandemic. • Describe the delayed payment of employer payroll taxes • Identify key characteristics of the modifications associated with the limitation of business interest • Review the technical amendments regarding qualified improvement property • Distinguish and identify the various rules of how to obtain carryback relief of certain business losses.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Retaining Top Talent	11/13/20 8:00 AM	50 Minutes	In this session, we will explore some initiatives to help increase employee engagement and retain talent.	Upon completion of this session, you will be able to: • Learn strategies that you can incorporate in your firm to help retain top talent • Gain a better understanding of the potential impact retention strategies have on your bottom line • Learn how to utilize the strategies to better "keep your finger on the pulse" of employee engagement within your firm	No pre-requisites	Any User	Intermediate	1	Trends in the Profession	Personnel/Human Resources – Non-Technical
Top 10 Microsoft Excel Tips for Accounting Professionals	11/13/20 8:00 AM	50 Minutes	In this session, we will discuss how you can be more efficient with Microsoft Excel. Do you consider yourself proficient with Excel but not an expert? You won't want to miss this session!	Upon completion of this session, you will be able to: • Apply 10 quick tips to bring greater efficiency to using Microsoft Excel • Identify how to easily navigate, utilize timesaving functions • Apply consistent formatting • Customize the status bar	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1	Technology	Computer Software & Applications – Non-Technical
How to Customize Practice CS Using Custom Fields for Your Firm	11/13/20 8:00 AM	75 Minutes	In this workshop, you'll see how other firms are taking advantage of the flexibility provided by the custom fields in Practice CS. We'll discuss innovative ways to track and centralize information to share with your entire firm. By taking advantage of the custom fields in Practice CS, your firm will gain efficiencies and new managing capabilities with your custom fields.	Upon completion of this session, you will be able to: • Uncover other ways firms are using custom fields • Centralize information to easily share with others in the office • Identify reporting capabilities with custom fields	Participants should be familiar with the setup in the Practice CS program.	Any User	Intermediate	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Tailoring Letters and Filing Instructions – Automatically Using UltraTax CS	11/13/20 8:00 AM	100 Minutes	Attending this session will help you use letters and filing instructions to their fullest potential. We will discuss using custom paragraphs and conditional formatting to tailor your client documents and provide clients with a more	Upon completion of this session, you will be able to: • Leverage custom paragraphs to include client-specific detail in letters automatically • Configure variables and print-if statements to personalize your client documents	A participant should have a working knowledge of UltraTax CS	Any User	Intermediate	2	Tax & Asset Management	Computer Software & Applications – Non-Technical
TCJA: An Evolving Situation Using UltraTax CS	11/13/20 8:00 AM	100 Minutes	Signed in 2017, the Tax Cuts and Jobs Act brought sweeping changes to federal tax policy, as well as changes to states with decoupling modifications. In this session, we will review how changes related to TCJA and Section 199A continue to evolve.	Upon completion of this session, you will be able to: • Understand continued changes related to TCJA • Navigate UltraTax CS to prepare returns affected by these changes	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Advanced	2	Tax & Asset Management	Taxes – Technical
Individual Tax CARES Act Provisions – What's New	11/13/20 9:00 AM	50 Minutes	On March 27, 2020, President Trump signed the "Coronavirus Aid, Relief, and Economic Security Act" (CARES Act) into law. This law marks the single largest economic stimulus package in history and is intended to provide relief to the many businesses and individuals impacted by COVID-19. This session focuses on the enacted tax provisions affecting individuals such as the 2020 recovery rebates for individuals, early retirement fund distribution rules, RMD waivers, charitable contribution limitation modifications, and other relevant provisions. session participants will have the working knowledge to apply the CARE Act to individuals filings Form 1040 for the 2020 tax year.	Upon completion of this session, you will be able to: • Describe the various individual tax provisions associated with the CARES Act • Distinguish between key dates and limitations pertaining to net operating losses, carrybacks and other expense and loss provisions • Identify rules pertaining to retirement plan and IRA Penalty-Free Distributions	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Client-Facing Tools to Better Serve Your Payroll Clients in a Remote Environment with Accounting CS	11/13/20 9:00 AM	75 Minutes	In this session, you will learn how to utilize tools available to your payroll clients for direct integration with Accounting CS while navigating a remote work environment.	Upon completion of this session, you will be able to: • Setup and use the Remote Payroll feature for clients to input their employees' payroll check hours and amounts • Update employee W-4 information and review check stubs and payroll tax forms through Employee Self-Service • Enable employees to enter time via the Employee Time Entry process • Use Client Access to allow clients direct access to payroll entry and payroll data in the Accounting CS application	A participant should be familiar with how to process payroll in Accounting CS.	Any User	Intermediate	1.5	Payroll	Computer Software & Applications – Non-Technical
Divisions, Consolidated, and Fund engagements in AdvanceFlow	11/13/20 9:00 AM	75 Minutes	In this session, you will learn how to effectively use divisions, consolidated, and fund engagements in AdvanceFlow.	Upon completion of this session, you will be able to: • Setup and utilize divisional engagements in AdvanceFlow • Create consolidated engagements • Utilize the fund structure to create and work within engagements	A participant should be familiar navigating in AdvanceFlow in the trial balance area.	Any User	Advanced	1.5	Auditing	Auditing – Technical
GoSystem Tax RS: 1065 and Special Allocations	11/13/20 9:00 AM	75 Minutes	In this session learn about how special allocations can be utilized in GoSystem Tax RS, common questions, state allocations, and different ways to allocate information on the 1065 returns. Participants should be familiar with 1065	Upon completion of this session, you will be able to: • Specially allocate items on the Federal and State returns • Import special allocation codes • Understand how allocations are designed	No pre-requisites	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
How did COVID-19 change your Practice Forward methodology?	11/13/20 9:00 AM	75 Minutes	In this session, you will hear how Paul Miller has adapted to working in new ways due to COVID-19. Paul will share changes implemented in technology, communications, the Two Meeting Approach, staffing considerations, client	Upon completion of this session, you will be able to implement some new strategies for working in new ways.	No pre-requisites	Any User	Overview	1.5	Advisory	Business Management & Organization – Non-Technical
Train the Trainer – Improving Your Presentation Skills	11/13/20 9:00 AM	75 Minutes	In this session, you'll learn how to improve your skills in delivering live presentations. Whether you instruct your own staff or deliver training or demonstrations for clients, you will learn tips and tricks for more effective	Upon completion of this session, you will be able to: • Manage classroom dynamics • Engage an audience, whether in person or remote • Identify levels of learning, and how to meet an audience's expectations	No pre-requisites	Any User	Basic	1.5	Trends in the Profession	Communications and Marketing – Non-Technical
Use Checkpoint to Stay on Top of Tax Developments in an Ever-Changing Environment	11/13/20 9:00 AM	75 Minutes	In this session, you will learn what resources are available in Checkpoint to help keep you informed of tax law changes/guidance, including COVID-19 related client letters, tools, and analysis from our editors. Also, if there's an issue that is particularly important to you, you will learn how to schedule a search to run automatically and send you an email notification when there were changes or	Upon completion of this session, you will be able to: • Locate tax news updates, and request email delivery of them • View new law analysis • Locate client letters and tools related to new tax laws • Perform a keyword search and schedule it to run automatically on topics you want to monitor • Locate pending legislation for a code section, and see past changes	Participants should have a working knowledge of Checkpoint.	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Proactive Management Tools for Accounting and Payroll services with Accounting CS	11/13/20 10:00 AM	50 Minutes	In this session, we will provide guidance to utilize tools in Accounting CS to effectively manage your teams.	Upon completion of this session, you will be able to: • Strategize new methods in which to utilize dashboards and reports • Understand how firm setup options can improve management of accounting and payroll engagements • Utilize firm-wide reports to better manage work • Manage alerts and notices to stay informed and prevent inaccuracies	Attendees should expect a focus on utilizing dashboards, reports and firm setup options to better manage your firm for both general ledger and payroll Firm owners, staff and administrators will all benefit from this session.	Any User	Intermediate	1	Accounting	Computer Software & Applications – Non-Technical
SECURE Act: How Protected Is Your Client's Retirement?	11/13/20 10:00 AM	50 Minutes	The Setting Every Community Up for Retirement Enhancement Act of 2019, better known as the SECURE Act, includes significant provisions aimed at increasing access to tax-advantaged accounts and preventing older Americans from outliving their assets. This session explores a number of rules related to tax-advantaged retirement accounts. After attending this session, participants should be able to describe the new rules regarding required minimum distributions, retirement plan inheritance, credits for retirement plan expenses, revised 401(k) safe harbor provisions, and many more retirement related provisions.	Upon completion of this session, you will be able to: • Describe and outline the various retirement planning changes associated with the SECURE Act, and how advise client in light of such provisions.	No pre-requisites	Any User	Intermediate	1	Tax & Asset Management	Taxes – Technical
Advanced Data Mining in UltraTax CS	11/13/20 12:00 PM	75 Minutes	Data Mining is a versatile tool that allows you to query your UltraTax CS client database for specific data and client characteristics. In this session, we will delve into configuration of custom reports, letters, and searches in data mining to allow you to tailor data mining output to your client base.	Upon completion of this session, you will be able to: • Configure custom searches to leverage information already in your tax database • Locate opportunities to provide advisory and other value-added searches	A participant should have a working knowledge of Data Mining within UltraTax CS	Any User	Advanced	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
Advanced Financial Statement Formatting Using the Accounting CS Report Designer	11/13/20 12:00 PM	75 Minutes	In this session, you will learn about advanced features within the Accounting CS Report Designer to further customize your clients' financial statements.	Upon completion of this session, you will be able to: • Customize date formats • Use conditional expressions to alter the output of variables • Create formulas for account groupings • Create departmental and location-based statements • Insert and format charts • Add variances and ratios to statements	A participant should be familiar with the bookkeeping processes within the application, and have experience modifying statements in the Report Designer.	Any User	Advanced	1.5	Accounting	Accounting – Technical
Audit Implications of COVID-19	11/13/20 12:00 PM	75 Minutes	This session will introduce and discuss various audit implications of COVID-19 including issues related to going concern, internal controls, fraud, and gathering evidence remotely.	Upon completion of this session, you will be able to: • List implications on upcoming audits of Covid-19 • Describe changes to going concern analyses and financial disclosures • Explain how changes in internal controls and additional fraud risks may exist for 2020 audits	A participant should have a working knowledge of audits and the virus.	Any User	Intermediate	1.5	Auditing	Auditing – Technical
Cloud Security	11/13/20 12:00 PM	75 Minutes	As business needs have changed, cloud computing has become the normal way of working. Where does your company's cybersecurity responsibility end and the vendor's responsibility begin?	Attending this session will help you: • Recognize common misconceptions of "cloud security" and "security in the cloud" • Safely navigate your company's cloud computing needs to effectively grow your business	No pre-requisites	Any User	Overview	1.5	Security	Information Technology – Technical
GoFileRoom: What's New	11/13/20 12:00 PM	75 Minutes	In this session we will discuss the newest features in GoFileRoom and FirmFlow as well as providing insight into the future roadmap.	Upon completion of this session, you will be able to: • Updated interface and new search capabilities • Overview of new options	No pre-requisites	Any User	Overview	1.5	Firm & Workflow Management	Computer Software & Applications – Non-Technical
GoSystem Tax RS Trial Balance	11/13/20 12:00 PM	75 Minutes	During this session, we will look at Trial Balance within the new organizer. This session is recommended for firms that would like to utilize the Trial Balance within the software. Participants should be familiar with the GoSystem Tax RS	Upon completion of this session, you will be able to: • Understand new functionality • Import from an outside program • Merge the Trial Balance into the return	No pre-requisites	Any User	Intermediate	1.5	Tax & Asset Management	Taxes – Technical
Microsoft Teams for Accounting Professionals	11/13/20 12:00 PM	75 Minutes	Attending this session will help you to embrace Microsoft Teams as a powerful collaboration tool for your firm. Teams integrates the people, the content, and the tools your team needs to be more engaged and effective. Participants should have a working knowledge of Microsoft Office.	Upon completion of this session, you will be able to: • Define the difference between channels and teams • Schedule and manage (or conduct) meetings both internally and externally • Use Teams for individual and group chats • Easily navigate and utilize helpful functions like searching and bookmarking • Execute calls and screen sharing in the application • Adjust preferences and settings • Integrate with other applications	A basic, working knowledge of the Microsoft Office Suite is recommended to attend this session.	Any User	Intermediate	1.5	Technology	Computer Software & Applications – Non-Technical
The Contactless Tax Return Using UltraTax CS	11/13/20 12:00 PM	75 Minutes	This session will demonstrate tax return workflow tools in UltraTax CS that can streamline tax preparation, including paperless and contactless workflow.	Upon completion of this session, you will be able to: • Use automatic data gathering through Web Client Tools, Source Document Processing, and more • Deliver drafts, final returns, and actionable items securely through client portals	A participant should have a working knowledge of preparing tax returns in UltraTax CS	Any User	Overview	1.5	Tax & Asset Management	Computer Software & Applications – Non-Technical
The Right Stuff: Transitioning Your Practice to Have The Right Relationships	11/13/20 12:00 PM	75 Minutes	In this session, you will hear how Brittany Lanphier has successfully transitioned her practice to include the right clients and the right relationships. Brittany will discuss her strategy, steps for transitioning, and what this has done for her practice. Brittany will discuss how she transitioned her client base to maintenance packages with clearly defined scope of work and a fixed recurring billing amount. Brittany will share the challenges she faced and how she overcame those challenges while implementing Practice Forward	Upon completion of this session, you will be able to implement some new strategies for working with your clients to increase revenue, reduce accounts receivables, and increase client satisfaction.	No pre-requisites	Any User	Overview	1.5	Advisory	Business Management & Organization – Non-Technical
Presenting FirmFlow Data in Power BI	11/13/20 12:00 PM	100 Minutes	In this session we will introduce Microsoft Power BI. This session will be focused on using data from GoFileRoom / FirmFlow to create reports within Power BI. We will discuss using different Power BI Visualizations with your GoFileRoom	Upon completion of this session you will understand: • Navigation within Power BI • Creation of reports in Power BI • Visualizations within Power BI • Transforming data within Power BI • Publishing reports	This session is recommended for firms that use GoFileRoom and/or FirmFlow.	Any User	Advanced	2	Firm & Workflow Management	Computer Software & Applications – Non-Technical
Strategic Planning: Generating Revenue and Capacity Projections	11/13/20 12:00 PM	100 Minutes	In this session we will take the information from Practice CS Staff management, project management and reporting and translate it to powerful data. This data will be utilized in an excel spreadsheet, which will be provided to participants, to help make strategic decisions regarding staffing and project revenue.	Upon completion of this session, you will be able to: • Setup and utilize the Practice CS modules for capacity planning • Run the provided custom Practice CS report along with setup to pull revenue projection numbers • Determine if you have enough staff, too much or too little resources and determine a course of action	Participants should have a working understanding of the setup of Practice CS.	Any User	Advanced	2	Firm & Workflow Management	Computer Software & Applications – Non-Technical
UltraTax CS Workflow Best Practices	11/13/20 12:00 PM	100 Minutes	Attending this session will help you understand best practices for an efficient, optimized UltraTax CS workflow. A consultant specialized in UltraTax CS will discuss the preparation process from the beginning to the end of the tax engagement, with a focus on the UltraTax CS Status System	Upon completion of this session, you will be able to: • Establish custom client status events • Determine the status of tax returns on an office-wide or more focused basis • Optimize your UltraTax CS Workflow	A participant should be familiar with preparing returns in UltraTax CS	Any User	Intermediate	2	Tax & Asset Management	Computer Software & Applications – Non-Technical
Corporate Tax Departments										
GT500 - ONESOURCE GTM Product Roadmap	11/10/20 7:00 AM	50 Minutes	Learn what exciting updates and enhancements ONESOURCE GTM has on its product roadmap.	Upon completion, attendees will be able to recognize enhancements to the ONESOURCE GTM solution.	General familiarity of ONESOURCE GTM.	End User	Update	1	GTM	Computer Software & Applications – Non-Technical
O130 - Managing Your Data Collection Process Using ONESOURCE DataFlow	11/10/20 7:00 AM	50 Minutes	Does your business collect data from remote parties around the globe? Learn how DataFlow can help standardize this process.	Upon completion attendees will be able to identify functionality of ONESOURCE DataFlow and recognize methods to manage the data collection processes within tax.	At least one year of working with ONESOURCE DataFlow	Administrator	Intermediate	1	ONESOURCE	Computer Software & Applications – Non-Technical
DC650 - Changing International Tax Regimes and How Technology Can Help	11/10/20 8:00 AM	50 Minutes	This course examines three perspectives on how to best help provide MNE tax departments with the tools to keep up with the complexities of globalization & digitalization of businesses to frequently changing tax rules.	Upon completion, attendees will be able to recognize how the globalization and digitization of business has impacted frequently changing tax rules and regulations, and identify methods to use technology to keep up with changes as they increase in frequency and in scope.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-DOM500 - What's New in ONESOURCE Income Tax (Domestic & International)	11/10/20 8:00 AM	50 Minutes	This session provides an overview of the new features that will be released for clients for the 2020 form year for both domestic and international.	Upon completion, attendees will be able to identify upcoming software enhancements.	General familiarity with ONESOURCE Income Tax	End User	Update	1	Direct Tax	Computer Software & Applications – Non-Technical
DP100 – ONESOURCE Tax Provision Version 2016 Basics	11/10/20 8:00 AM	50 Minutes	During this lecture, we will orient attendees to the look of Tax Provision covering the navigation paradigms, data review functions, drill-down capabilities, as well as data entry and transfer functionality.	Upon completion, attendees will be able to identify the navigation steps and processes associated with the v2016 ONESOURCE Tax Provision application.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT610 Brexit Update: Trade with the UK	11/10/20 8:00 AM	50 Minutes	Review the status of Brexit and learn how it will affect trade with the UK.	Upon completion, attendees will be able to evaluate how Brexit will affect their supply chains and identify opportunities with trade with the UK.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I610 - Grant Thornton/Johnson Matthey: Lessons Learned from ONESOURCE SAP Implementation	11/10/20 8:00 AM	50 Minutes	This Case Study with Johnson Matthey highlights lessons learned from a SAP Global Next implementation and how to get the most out of the Tax Code Qualifier functionality in the ONESOURCE Indirect tax engine and reporting.	Upon completion, attendees will be able to identify procedures and techniques used in a SAP implementation and recognize the overall implementation approach and key areas to consider.	No pre-requisites	End User	Basic	1	Indirect Tax	Information Technology – Technical
O650 - Global Tax Management: Stay in Your Lane – Use the Appropriate Tool for the Job	11/10/20 8:00 AM	50 Minutes	Learn how to understand the roles that DataFlow, Alteryx and PowerBI all play in your tax department and how to leverage them to the best of their abilities to enable end-to-end integration across your tax technology stack.	Upon completion, attendees will be able to identify the role of DataFlow, Alteryx, and PowerBI in the tax department; recognize where and when to use them; and recognize methods to leverage them across tax technology.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-DOM400 - Best Practices for Federal Consolidated Returns	11/10/20 9:00 AM	50 Minutes	This session covers best practices for preparing federal consolidated returns. Example items to be discussed are Form 851, Form 7004, as well as consolidating schedules.	Upon completion, attendees will be able to identify best practices for federal consolidations.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-HNTL200 - ONESOURCE Income Tax International - Tips and Tricks	11/10/20 9:00 AM	50 Minutes	Discover best practices and solutions for commonly asked questions related to the International module of ONESOURCE Income Tax. Topics discussed will include reconciling the flow of data to forms, avoiding common mistakes, and processing amending returns.	Upon completion, attendees will be able to recognize common software questions and their resolution.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DP160 - Global Access Manager	11/10/20 9:00 AM	50 Minutes	We will cover the web-based Global Access module of ONESOURCE Tax Provision – data gathering screens, available reports, sign-off sequence, questionnaires, and user setup including v2014 group functionality.	Upon completion, attendees will be able to identify the fundamental features and functionality of the web-based Global Access module of ONESOURCE Tax Provision.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP630 - EY - Optimizing the Interim Provision Process	11/10/20 9:00 AM	50 Minutes	Learn about the interim functionality within ONESOURCE Tax Provision to complete a seamless quarterly provision and best practices in utilizing a regular dataset to generate the forecasted ETR, accommodate discrete items, and produce the final quarterly calculation efficiently utilizing data integration tools.	Upon completion of this session attendees will be able to recognize how to utilize the interim functionality, efficiently calculate a forecasted ETR and how to leverage other data integration tools to complete the interim provision calculation.	At least 1 year experience with ONESOURCE Tax Provision.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT600 - The Presidential Election: What's Next for Global Trade?	11/10/20 9:00 AM	50 Minutes	Discussion of how the US presidential election will affect trade policy.	Upon completion, attendees will be able to evaluate how the next president's trade agenda could possibly affect the supply chain.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical

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I110 - Indirect and Property Tax Horizons	11/10/20 9:00 AM	50 Minutes	Join Indirect Tax leaders Ray Grove, VP of Product Management, and Adam Schaffner, Value Proposition, as they cover key industry trends, new opportunities and the strategy for Indirect and Property Tax. This session	Upon completion, attendees will be able to identify trends in the indirect tax market, and recognize the ONESOURCE Indirect Tax strategy evolve and innovate products to meet these needs.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O600 - Humana & TR: Business Continuity While Working from Home with ONESOURCE	11/10/20 9:00 AM	50 Minutes	Learn from your peers how they tackled the challenge to continue keep the tax department running while working from home. How did they enable a virtual work environment with ONESOURCE and support from Thomson Reuters teams and partners?	Upon completion attendees will be able to identify best practices for working virtually with ONESOURCE, evaluate alternative approaches, and recognize strategies that could drive efficiencies across their tax processes.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
TT230 - I didn't know ONESOURCE Trust Tax could do that!	11/10/20 9:00 AM	50 Minutes	This session will review the lesser known functions in ONESOURCE Trust Tax that you could be using to become more productive.	Upon completion, attendees will be able to identify features in ONESOURCE Trust Tax application to generate worksheets, advice letters, and more.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM600 - EY & TR: COVID-19 - Now, Next & Beyond	11/10/20 10:00 AM	50 Minutes	Discuss how COVID19 is disrupting the tax landscape and learn how corporations are thinking strategically about their tax function now, next and beyond.	Upon completion, attendees will be able to recognize the changes in tax law and identify practices that will help them prepare reporting and tax returns due to COVID19.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-INTL600 - Crowe: Leveraging the OIT International Module – Maximize Your Investment	11/10/20 10:00 AM	50 Minutes	An often underutilized, yet very powerful tool, the International module of ONESOURCE Income Tax provides substantial benefits when its built-in automation is leveraged. Regardless of whether you have few or several	Upon completion of this session attendees will be able to recognize best practices when using OIT International; and identify methods to maximize functionality and address the multiple computations and automation aspects of the module.	No pre-requisites	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP130 – ONESOURCE Workpapers Basics	11/10/20 10:00 AM	50 Minutes	We will cover the Workpaper Add-In ribbon and Workpaper Manager area of the ONESOURCE platform. Existing Active Workpaper customers will benefit from the discussion covering the upgrade to ONESOURCE Tax Provision	Upon completion, attendees will be able to identify the key features, benefits, and navigational processes for the ONESOURCE Workpapers application.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP190 - Tax Provision Integrations	11/10/20 10:00 AM	50 Minutes	A review of the data that can be integrated between Tax Provision and other applications in the ONESOURCE Suite as well as review of the process	Upon completion, attendees will be able to identify the data that can be integrated between Tax Provision and other applications in the ONESOURCE Suite and apply the process to their data.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT100 - Exploring GTM Platform Tools and Zone Health Checks	11/10/20 10:00 AM	50 Minutes	Explore Platform Tools, such as BPM, Report Builder, Look up, etc., and learn about our Zone Health Checks	Upon Completion, attendees will be able to identify how Platform Tools can enhance user experience and recognize the benefits of Zone Health Checks	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I130 - What's New with ONESOURCE Determination – Original Shared and Original Dedicated cloud	11/10/20 10:00 AM	50 Minutes	Learn about enhancements to our Original applications – Determination, Certificate Manager, and Reporting – to meet indirect tax regulations. We'll discuss the changes we've made in 2020 and give you a preview of additional	Upon completion, attendees will be able to identify updates and additions made to ONESOURCE Indirect Tax to address regulatory gaps and broaden coverage of Indirect Tax logic.	General familiarity with ONESOURCE Indirect Determination.	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical
O610 - Taxologist Roundtable: Technology Then and Now & Value Impacts for Your Business	11/10/20 10:00 AM	50 Minutes	Prior Taxologist Winners share technology initiatives and contrast those to the technology landscape between then & now. Learn leading practices & distinctive characteristics for Tax Departments and how technology factors into their trusted	Upon completion, attendees will be able to identify leading practices in tax technology and recognize methods to adopt current technology solutions.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT110 - What's New with ONESOURCE Property Tax	11/10/20 10:00 AM	50 Minutes	This session will present an overview of ONESOURCE Property Tax recent key developments as well as a preview of future enhancements.	Upon completion attendees will be able to identify enhancements released in the ONESOURCE Property Tax software during 2020 as well as recognize future initiatives.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TI610 - 1099/1042-S Changes, Updates and Insight for Tax Year 2020	11/10/20 10:00 AM	50 Minutes	In this session we will learn about any changes and updates to IRS Forms 1099 and 1042-S for tax year 2020. We will also discuss additional insights on tax information reporting.	Upon completion, attendees will be able to identify the changes for 1099 and 1042-S reporting for 2020 and apply techniques for their tax information reporting compliance.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Taxes – Technical
TT600 - Fiduciary Tax Update: A Discussion of the Latest Tax Developments	11/10/20 10:00 AM	50 Minutes	The session will cover recent developments in the taxation of individuals, estates and trusts over the last year; provide some observations about the 2020 filing season; and predictions about the 2021 filing season.	Upon completion, attendees will be able to identify the latest tax developments and evaluate the impact of those developments on their tax return processing.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Trust Tax	Taxes – Technical
DI-DOM410 - ONESOURCE Income Tax: Did You Know?	11/10/20 12:00 PM	50 Minutes	Have you heard of the Federal Adjustment Workpaper, Enterprise Control Panel, State TI Workpapers? Do you know how to subview member binders? If not, then this is the session for you. This session will cover many tips to help you get the most out of TAS and the Organizer.	Upon completion, attendees will be able to recognize features of ONESOURCE Income Tax, RS version.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-INTL100 - Introduction to Processing 5471s in ONESOURCE Income Tax International	11/10/20 12:00 PM	50 Minutes	New to ONESOURCE International? This session will cover setting up and using the software to process your CFC returns, including the calculation of subpart F, dividends, deemed paid credits, and reconciling the flow of amounts	Upon completion, attendees will be able to recognize ONESOURCE Income Tax International module best practices for 5471 processing.	No pre-requisites	End User	Basic	1	Direct Tax	Taxes – Technical
DP500 - Next Gen Tax Provision Overview	11/10/20 12:00 PM	50 Minutes	Explore the future of ONESOURCE Tax Provision using an API-based calculation engine and self-service reporting interface.	Upon completion, attendees will be able to recognize the features of Tax Provision and Global Access reporting using an API-based calculation engine and a self-service reporting interface.	At least two years of experience with ONESOURCE Tax Provision	End User	Advanced	1	Direct Tax	Computer Software & Applications – Non-Technical
GT500R1 - ONESOURCE GTM Product Roadmap (Repeat)	11/10/20 12:00 PM	50 Minutes	Learn what exciting updates and enhancements ONESOURCE GTM has on its product roadmap.	Upon completion, attendees will be able to recognize enhancements to the ONESOURCE GTM solution.	General familiarity of ONESOURCE GTM.	End User	Update	1	GTM	Computer Software & Applications – Non-Technical
I160 - What's New with ONESOURCE Indirect Compliance for VAT & GST	11/10/20 12:00 PM	50 Minutes	Come see an overview of ONESOURCE Indirect Compliance for VAT & GST recent key developments, as well as a preview of future enhancements.	Upon completion, attendees will be able to identify enhancements released in the ONESOURCE Indirect Compliance for VAT & GST software and recognize future initiatives.	General familiarity with ONESOURCE Indirect Tax Compliance	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical
O100 - ONESOURCE User Administration Basics	11/10/20 12:00 PM	50 Minutes	An overview of ONESOURCE User Administration's current capabilities. How to leverage its core functionality to remove redundant processes. Insight into the application's future roadmap.	Upon completion, attendees will be able to identify the key features, benefits, and navigational processes for the ONESOURCE User Administration.	No pre-requisites	Administrator	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT120 - ONESOURCE Property Tax Modernization	11/10/20 12:00 PM	50 Minutes	This sessions will provide an overview of several updates to the new user interface for ONESOURCE Property Tax.	Upon completion, attendees will be able to recognize enhancements to the design and layout of ONESOURCE Property Tax.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TI500 - What's New in ONESOURCE Tax Information Reporting - A Product Update	11/10/20 12:00 PM	50 Minutes	Learn about changes coming to ONESOURCE Tax Information Reporting for the 2020 tax season resulting from regulatory changes, plus other product updates and enhancements.	Upon completion, attendees will be able to identify the regulatory changes being implemented in the system for the upcoming tax season and recognize the benefits of the new features and how they will assist with tax form preparation and filing.	General familiarity with ONESOURCE Tax Information Reporting product functionality	End User	Update	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT500 - What's New in ONESOURCE Trust Tax - A Product Update	11/10/20 12:00 PM	50 Minutes	Learn about changes coming to ONESOURCE Trust Tax for the 2020 tax season resulting from regulatory changes, plus other product updates and enhancements.	Upon completion, attendees will be able to identify the regulatory changes being implemented into the system for the upcoming tax season and recognize the benefits of the new features which will assist with tax preparation and filing.	General familiarity with ONESOURCE Trust Tax product functionality	End User	Update	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM100 - Preparing State Returns in ONESOURCE Income Tax (including State A&A and State TI)	11/10/20 1:00 PM	50 Minutes	For users with less than one year's experience using ONESOURCE Income Tax, RS version, this session covers the basics through to processing a state return. Learn how to enter A&A and modification data, use Organizer, and	Upon completion, attendees will be able to recognize the steps for completing state returns using ONESOURCE Income Tax.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-INTL220 - Tracking E&P, Tax Pools and other advanced topics for Foreign Entity Processing	11/10/20 1:00 PM	50 Minutes	The Tax Cuts and Jobs Act introduced many changes to the tracking and reporting of E&P and tax information. This session will show you how to review current year activity and the history of your E&P and taxes through reports and to the presentation of amounts on foreign forms.	Upon completion, attendees will be able to recognize best practices for E&P tracking using ONESOURCE Income Tax, RS version.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DP110 - Tax Basis Balance Sheet and Income Statement	11/10/20 1:00 PM	50 Minutes	Create lines and sublines for the tax basis balance sheet structure, import lines and sublines, enter account data manually, bridge account data from a GL system, create a temporary difference layer onto accounts, and more.	Upon completion, attendees will be able to identify the steps and activities to create a tax basis balance sheet structure and the alternative methods for entering data for the accounts in the structure.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP650 - Crowe: Maximize Provision Reporting by Using Power BI, Plug-ins, Workpapers and API's	11/10/20 1:00 PM	50 Minutes	Looking for a better way of creating and analyzing reporting requirements? Learn to use the tools to automate the creation of your reporting requirements that will drive more effective analytics.	Upon completion of this session attendees will be able to identify the multiple options available for reporting data; recognize and evaluate the best options for specific needs and requirements; and apply the reporting concepts in your tax process.	No pre-requisites	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT110 - Keeping up with Regulatory Changes Using Global Trade Content	11/10/20 1:00 PM	50 Minutes	Learn how to keep up with changing tariffs and regulations for more than 210 countries and territories around the world with Global Trade Content.	Upon completion, attendees will be able to recognize methods to use ONESOURCE Global Trade Content to stay current with changing tariffs and regulations.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I120 - What's New with ONESOURCE Determination – Shared and Dedicated Cloud	11/10/20 1:00 PM	50 Minutes	This session will review the enhancements made to IDT Cloud over the last year. Learn about the design concepts, functional changes and new features of Indirect Tax on the ONESOURCE platform.	Upon completion, attendees will be able to identify design concepts and functional product changes, recognize new terminology and planned enhancements to the Indirect Tax user experience.	General familiarity with ONESOURCE IDT Cloud.	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
O660 - SMRTR, Ronald Hein & TR: A.I. for the Corporate Tax Professional: Do More w/ Less	11/10/20 1:00 PM	50 Minutes	Hear from Tim van Uden from SMRTR, Chris Dimenna from Thomson Reuters and Ronald Hein, researcher at the University of Tilburg, about artificial intelligence and how it can make the lives of corporate tax professionals easier.	Upon completion, attendees will be able to differentiate between types of AI, recognize the application in the field of tax research, interpretation & analysis, recognize how AI can help tax professionals with daily tasks and determine how AI tools can help retain and attract talent.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT130 - Asset Center Best Practices	11/10/20 1:00 PM	50 Minutes	Learn the best practices for preparing for personal property filing season. This includes filing a return, suggested reports, processes, settings, and more.	Upon completion, attendees will be able to identify recommended procedures for preparing for personal property filing season.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TT110 - K-1 and 1099 Delivery Options	11/10/20 1:00 PM	50 Minutes	Learn about the options available for delivery of recipient documents and data. Session will review Mail Service, OFX, Web Delivery and Document Delivery with an emphasis on how each option will improve productivity and/or enhance your	Upon completion attendees will be able to determine which delivery methods would bring the most value to their organization and the clients they serve.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM110 - An Overview of the Federal and State E-File Process	11/10/20 2:00 PM	50 Minutes	The course will cover the basics of electronic filing for federal and state returns.	Upon completion, attendees will be able to identify steps to electronically file federal and state returns in ONESOURCE Income Tax.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-INTL300 - Foreign Tax Credit Entities and Form 1118 Processing	11/10/20 2:00 PM	50 Minutes	Beyond the basics, this session will delve into working with Foreign Tax Credit entities and processing Form 1118. The flow of information within the reports and to the form will be discussed along with best practices and tips.	Upon completion, attendees will be able to recognize best practices for Form 1118 when processing returns using ONESOURCE Income Tax International module.	Two or more years of experience with ONESOURCE Income Tax.	End User	Advanced	1	Direct Tax	Taxes – Technical
DP150 - Deferred Tax Presentations	11/10/20 2:00 PM	50 Minutes	This session covers the use of activity, deferred-only and balance-sheet-only data entry fields for temporary differences as well as the calculation and presentation of those temporary differences on the Deferred Balances report.	Upon completion, attendees will be able to identify the steps for the creation of user-defined columnar expansion and the adjustment rollover functionality for the deferred balances report.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT130 - GTM Customer Support Update: Tips and Tools	11/10/20 2:00 PM	50 Minutes	This session will cover ONESOURCE GTM customer support, such as case reduction goals, how to use self-help tools and the ticketing system.	Upon completion, attendees will be able to recognize steps to submit support ticket, use self help tools and efficiently interact with customer support.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I150 - What's New with ONESOURCE Sales & Use Tax Compliance	11/10/20 2:00 PM	50 Minutes	Come see an overview of ONESOURCE Sales & Use Tax Compliance recent key developments as well as a preview of future enhancements.	Upon completion, attendees will be able to identify enhancements released in ONESOURCE Sales & Use Tax Compliance and recognize future initiatives.	General familiarity with ONESOURCE Sales & Use Tax Compliance	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical
O110 - ONESOURCE Entities & Chart of Accounts	11/10/20 2:00 PM	50 Minutes	An overview of core capabilities of ONESOURCE Entities and Chart of Accounts. Insight into the features of these applications and onboarding roadmaps.	Upon completion attendees will be able to recognize the ONESOURCE Entities centralized framework and identify central capabilities for maintaining and tracking key entity data such as owners, contact, locations, and IDs.	No pre-requisites	Administrator	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT140 - Tax Center Best Practices	11/10/20 2:00 PM	50 Minutes	This session will give you insight into the various time-saving tips and tricks that users of the ONESOURCE Property Tax application can utilize to help streamline some of their compliance needs.	Upon completion, attendees will be able to recognize the recommended flow of data entry in Tax Center, identify steps to set up a parcel, fields, and modules, and analyze the impact of steps on data.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TI100 - Pre Tax Season Readiness	11/10/20 2:00 PM	50 Minutes	This session will review tasks to get you ready for print/filing season. Review the importance of the Annual Planning Document, rolling over maps, profiles and options, testing files, working rejected files/records, and using the Data Review	Upon completion, attendees will be able to identify steps to prepare for the annual tax season, identify items to address with their CES, recognize steps to analyze and resolve rejects from file imports and determine how to use the Data Review Guide.	No pre-requisites	End User	Basic	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT640 - Qualified Business Income Deduction 2020 Update	11/10/20 2:00 PM	50 Minutes	This session will provide an update on developments regarding the qualified business income deduction. The session will cover the final regulations the IRS issued on June 24, 2020, new Forms 8995 and 8995-A, and other new IRS developments.	Upon completion, attendees will be able to recognize the latest developments related to QBI and determine how these regulations impact tax return processing in this area.	At least one year or equivalent experience in fiduciary tax or tax information reporting	End User	Intermediate	1	Trust Tax	Taxes – Technical
DI-DOM120 - Using ONESOURCE Workpapers	11/10/20 4:00 PM	50 Minutes	Learn how to import and extract organizer data into ONESOURCE Income Tax using ONESOURCE Workpapers. ONESOURCE Workpapers is frequently used to assist with data entry for the new international forms.	Upon completion attendees will be able to use ONESOURCE Workpapers to populate the organizer.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP230 - Journal Entry Functionality and Reporting	11/10/20 4:00 PM	50 Minutes	We will identify the steps included in calculating the tax journal entry, core calculation, v2016 JE profiles, sample JE calculations, configurable JE module, simple JE, custom JE, generating and posting of the JE, and closed-loop	Upon completion, attendees will be able to recognize the general functionality of the ONESOURCE Tax Provision journal entry process, and identify steps to generate a report to book entries in the general ledger for the provision results.	At least one year of experience with ONESOURCE Tax Provision	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT400 - Best Practices: Training Makes For Better Compliance	11/10/20 4:00 PM	50 Minutes	Learn how to implement an online self study training program, into your trade compliance program.	Upon completion, attendees will be able to apply the steps needed to implement an online self-study training program on trade.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I140 - ONESOURCE Indirect Tax Integrations: Current State and Future Vision	11/10/20 4:00 PM	50 Minutes	Come see an overview of the latest product changes, enhancements and features, as well as future release items and new product offerings related to ERP and systems integrations.	Upon completion, attendees will be able to identify new features and determine the value they can provide, and evaluate which release version to use.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O640 - KPMG: "Kinetic" Tax Data Approach-Harnessing the Power of Data in Motion by Managing Tax Data	11/10/20 4:00 PM	50 Minutes	Learn about the benefits a tax department can achieve by owning and managing its own tax data and the tools needed to put this valuable Kinetic Tax Data Approach infrastructure in place, including OWM, DataFlow, Alteryx & the new	Upon completion, attendees will be able to recognize the benefits of owning and managing their own data; recognize technology tools needed; and identify the non-technology items needed to achieve the Kinetic Tax Data Approach.	Two or more years working with tax data.	End User	Advanced	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-INTL110 - Processing GILTI through ONESOURCE Income Tax	11/10/20 5:00 PM	50 Minutes	Learn how to process Global Intangible Low-Taxed Income (GILTI) through ONESOURCE Income Tax from data entry, through calculations and reports, to reporting information on forms.	Upon completion, attendees will be able to recognize methods to process GILTI using ONESOURCE Income Tax.	No pre-requisites	End User	Basic	1	Direct Tax	Taxes – Technical
DP120 - Return to Provision True Up	11/10/20 5:00 PM	50 Minutes	This session covers the automated methodology for representing return to provision entries in ONESOURCE Tax Provision, federal and state; and system requirements to identify and post true-up items into the current provision.	Upon completion, attendees will be able to identify the steps required for the system to calculate and post true-up amounts in the current provision data set.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
I620 – The Value of Master Data for Global Compliance in the Indirect Tax Determination Process	11/10/20 5:00 PM	50 Minutes	Discover the role of Tax Transformation in rapid implementations to meet digital compliance requirements in the changing environment for indirect tax e-invoicing, e-reporting and tax analytics.	Upon completion of this session, attendees will be able to identify data accelerators that could lead to the success of global engagements and recognize the value of best and leading practices and having a principal with physical presence across continents.	At least two years experience with Indirect Tax.	End User	Advanced	1	Indirect Tax	Computer Software & Applications – Non-Technical
GT160 - What is New in Screening and Clear?	11/10/20 6:00 PM	50 Minutes	Learn what is new in DPS solution and CLEAR, online investigative software that helps you complete your know your customer research.	Upon completion, attendees will be able to identify the steps to screen customers using DPS and evaluate how CLEAR strengthens supply chain security.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
O100R1 - ONESOURCE User Administration Basics (Repeat)	11/11/20 7:00 AM	50 Minutes	An overview of ONESOURCE User Administration's current capabilities. How to leverage its core functionality to remove redundant processes. Insight into the application's future roadmap.	Upon completion, attendees will be able to identify the key features, benefits, and navigational processes for the ONESOURCE User Administration.	No pre-requisites	Administrator	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
EU500 - Next Generation Technology Now – how the new web-based ONESOURCE Corporate Tax will benefit you	11/11/20 8:00 AM	50 Minutes	The next generation of ONESOURCE Corporate Tax UK is now released, so join our panel discussion to find out more about how you can transition to the new cloud-based application and benefit from enhanced usability, more efficient preparation, new features and improved integration.		No pre-requisites	Any User	Basic	0	Direct Tax	N/A
DI-DOM420 - State Combined/Consolidated Returns Best Practices	11/11/20 8:00 AM	50 Minutes	This informative session demystifies state combined/consolidated return preparation. Best practices and tips for combined/consolidated returns will be the focus. It is recommended you familiar with the consolidation process within ONESOURCE Income Tax.	Upon completion, attendees will be able to recognize state combined/consolidated best practices using ONESOURCE Income Tax.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DI-INTL100R1 - Introduction to Processing 5471s in ONESOURCE Income Tax International (Repeat)	11/11/20 8:00 AM	50 Minutes	New to ONESOURCE International? This session will cover setting up and using the software to process your CFC returns, including the calculation of subpart F, dividends, deemed paid credits, and reconciling the flow of amounts	Upon completion, attendees will be able to recognize ONESOURCE Income Tax International module best practices for 5471 processing.	No pre-requisites	End User	Basic	1	Direct Tax	Taxes – Technical
DP600 - EY: Using ONESOURCE Tax Provision & Workpapers for ETR Scenario Planning	11/11/20 8:00 AM	50 Minutes	Explore leveraging of Power Query and ONESOURCE Workpapers to enable a flexible interim provision process with ONESOURCE Tax Provision.	Upon completion, attendees will be able to identify tools that facilitate a successful and efficient calculation; and identify opportunities to leverage these tools together for more processes.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT140 - New Connectors in GTM	11/11/20 8:00 AM	50 Minutes	Learn about our GTM connectors to SAP, Oracle and Infor.	Upon completion, attendees will be able to identify how ONESOURCE GTM connects to SAP and Oracle.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
GT640 - Duty Optimization Across the Globe	11/11/20 8:00 AM	50 Minutes	Learn about the different duty optimization programs around the globe, which can help realize duty savings.	Upon completion, attendees will be able to identify different duty deferral programs and compare programs from various customs regimes.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I630 - Taxability of cloud services	11/11/20 8:00 AM	50 Minutes	Learn about the indirect tax implications when buying or selling cloud services. Learn what companies should look for when assessing whether a cloud-based service is subject to sales tax.	Upon completion of this session attendees will be able to recognize how to assess Cloud-Based Services subject to sales tax and identify the tax implications when buying and selling.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O110R1 - ONESOURCE Entities & Chart of Accounts (Repeat)	11/11/20 8:00 AM	50 Minutes	An overview of core capabilities of ONESOURCE Entities and Chart of Accounts. Insight into the features of these applications and onboarding roadmaps.	Upon completion attendees will be able to recognize the ONESOURCE Entities centralized framework and identify central capabilities for maintaining and tracking key entity data such as owners, contact, locations, and IDs.	No pre-requisites	Administrator	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical

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O710 - KPMG: Combining the Power of ONESOURCE DataFlow and Alteryx to Collect and Manage Tax Data	11/11/20 8:00 AM	50 Minutes	Learn how KPMG used DataFlow and Alteryx to make a huge impact at Assa Aloy – saving time during the annual tax compliance process with a focus was on collecting, managing, and importing foreign tax data to ONESOURCE Income Tax.	Upon completion of this session attendees will be able to recognize methods to apply DataFlow and Alteryx for the purpose of creating more efficient data collection/management processes; and, identify the benefits in the overall tax process solution.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
DI-DOM430 - Getting the Most from Common State Best Practices	11/11/20 9:00 AM	50 Minutes	Learn best practices and tips for getting the most from Common State Best Practices. See how this can be used to speed up your state return preparation and review process.	Upon completion, attendees will be able to recognize common state best practices using ONESOURCE Income Tax.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DI-INTL300R1 - Foreign Tax Credit Entities and Form 1118 Processing (Repeat)	11/11/20 9:00 AM	50 Minutes	Beyond the basics, this session will delve into working with Foreign Tax Credit entities and processing Form 1118. The flow of information within the reports and to the form will be discussed along with best practices and tips.	Upon completion, attendees will be able to recognize best practices for Form 1118 when processing returns using ONESOURCE Income Tax International module.	Two or more years of experience with ONESOURCE Income Tax.	End User	Advanced	1	Direct Tax	Taxes – Technical
DP240 - Flow-Through Functionality	11/11/20 9:00 AM	50 Minutes	We will provide instruction around configuring flow-through profiles, assigning profiles and percentages to units, and validating flow-through entries. We will demonstrate how flow-through can address CFCs, DREs, Branches, and	Upon completion, attendees will be able to identify the general concepts of Version 2016's flow-through functionality and determine the best use cases for this functionality.	At least one year of experience with ONESOURCE Tax Provision	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT120 - Best Practices on Using ONESOURCE FTZ	11/11/20 9:00 AM	50 Minutes	Learn the best way to use ONESOURCE FTZ to manage your zone.	Upon completion, attendees will be able to identify the key features and benefits, and apply them to their FTZ.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I180 - ONESOURCE Indirect Compliance for VAT & GST - New Digital Tax Reporting and Market Trends	11/11/20 9:00 AM	50 Minutes	See how ONESOURCE Indirect Compliance for VAT & GST solves digital tax reporting requirements for UK MTD, SAF-T, SII, and other regimes. We also discuss e-commerce, e-retailers and shifts in European market and policy for indirect compliance.	Upon completion, attendees will be able to identify the requirements for UK MTD, SAF-T, SII, and other digital tax reporting regimes and recognize the application of ONESOURCE Indirect Compliance for VAT & GST for digital tax reporting.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
I250 - Holistic Indirect Tax Management in Supply Chain Operations	11/11/20 9:00 AM	50 Minutes	Join Stanley Black and Decker's Poornima Sadanandan as she presents the complexities of indirect procurement operations, the best practices to avoid tax overpayments and underpayments, missed early pay incentives, and improved supplier relationships.	Upon completion, attendees will be able to identify indirect procurement operational complexities, analyze tax impacts on the procurement process, determine tax automation opportunities and capabilities and evaluate automation best practices.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O620 - DuPont & TR: Keeping up with Changing Tax Legislation - TCJA Lessons Learned & Best Practices	11/11/20 9:00 AM	50 Minutes	Your peers will share lessons learned and best practices looking back at TCJA. Hear how they used Checkpoint Solutions to stay informed and how ONESOURCE has helped with output planning, modeling & forecasting effects	Upon completion, attendees will be able to identify new regulations in Checkpoint, and recognize processes using ONESOURCE for output planning, modeling and forecasting effects of foreign inclusions.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
O660R1 - SMRTR, Ronald Hein & TR: A.I. for the Corporate Tax Professional: Do More w/ Less (Repeat)	11/11/20 9:00 AM	50 Minutes	Hear from Tim van Uden from SMRTR, Chris Dimenna from Thomson Reuters and Ronald Hein, researcher at the University of Tilburg, about artificial intelligence and how it can make the lives of corporate tax professionals easier.	Upon completion, attendees will be able to differentiate between types of AI, recognize the application in the field of tax research, interpretation & analysis, recognize how AI can help tax professionals with daily tasks and determine how AI tools can help retain and attract talent.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT150 - How Accruals work in ONESOURCE Property Tax	11/11/20 9:00 AM	50 Minutes	This session will review the functionality available in Tax Center for accruing for tax liability within the system, including client fiscal year versus jurisdiction fiscal year mapping and true up scenarios.	Upon completion, attendees will be able to identify how Tax Center data and the client fiscal year affects the accruals generated within the system.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TT100A - New User Training – Rolling Up Your Sleeves with ONESOURCE Trust Tax (Part 1)	11/11/20 9:00 AM	50 Minutes	Let us walk you through the basics of using OTT as a new or unseasoned user. This session will give you an understanding of the navigation and grid functionality as well as best practices, tips and tricks while utilizing the software.	Upon completion, attendees will be able to recognize tools in ONESOURCE Trust Tax that help navigate the grid functionality and identify best practices, tips and tricks that enhance the use of the software.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
DC640 – Cowen Inc, Orbitax, TR: "Hallmark" strategies to stay ahead of DAC6 / MDR	11/11/20 10:00 AM	50 Minutes	Hear how to prepare clients to stay ahead of DAC6 and the anticipated avalanche of MDR rules to come. COVEN INC. will share their DAC6 implementation journey & strategy in order to meet all forthcoming due dates	Upon completion, attendees will be able to recognize the DAC6 compliance requirements and determine an implementation strategy to meet due dates and filing deadlines.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-DOM200 - Using Data Query for Reporting	11/11/20 10:00 AM	50 Minutes	See how data query can be used to speed up your federal return preparation and review process. Learn about some reports you can create and use over and over again to quickly access much-needed data for your federal, state and international return processing.	Upon completion, attendees will be able to recognize methods of extracting data from ONESOURCE Income Tax using data query.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP360 - Advanced Topics in Tax Provision	11/11/20 10:00 AM	50 Minutes	This session will explore advanced functionality in Tax Provision V2016. We will cover advanced reporting, administration and various other topics.	Upon completion, attendees will be able to recognize advanced functionality in Tax Provision v2016.	At least two years of experience with ONESOURCE Tax Provision	End User	Advanced	1	Direct Tax	Computer Software & Applications – Non-Technical
GA500 - Global Accounting Firms Update	11/11/20 10:00 AM	50 Minutes	Join us for a review of new features and functions, Tax Law Updates, a review of APIs and our over-arching data strategy including the Developer Portal and Alteryx Connector.	Upon completion of this session, attendees will be able to recognize new features, identify APIs available for User Administration, identify Alteryx Connectors and recognize the Developer portal.	No pre-requisites	End User	Basic	1	Global Accounting Firm Users	Computer Software & Applications – Non-Technical
I190 - Introduction to Indirect Tax Next Generation Reporting and Analytics	11/11/20 10:00 AM	50 Minutes	Learn about the next generation of Reporting for Indirect Tax. See the new way to access ONESOURCE Determination audit data, starter reports, how to build custom reports, data visualization functionality and APIs to export data to other	Upon completion, attendees will be able to identify new functionality of Reporting for Indirect Tax, and recognize methods to apply the functionality to data management issues.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O730 - Roundtable Discussion with KPMG: Create Automation, Efficiencies & Remote Working Environments Using ONESOURCE	11/11/20 10:00 AM	50 Minutes	Learn how KPMG's Tax Transformation team worked with J&J, Skanska, Akamai, IFF & J2 to design and implement various ONESOURCE & Alteryx solutions to achieve enhanced automation, efficiencies & successful remote	Upon completion, attendees will be able to enhance automation, create efficiencies, and improve end-to-end provision, compliance and tax process/data management remote working environments.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT160 - Tips and Tricks Program Forms	11/11/20 10:00 AM	50 Minutes	This session will provide tips on how to process complicated programmed forms in the Asset Center.	Upon completion, attendees will be able to process the more complicated programmed forms in ONESOURCE Property Tax.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TI100R1 - Pre Tax Season Readiness (Repeat)	11/11/20 10:00 AM	50 Minutes	This session will review tasks to get you ready for printfling season. Review the importance of the Annual Planning Document, rolling over maps, profiles and options, testing files, working rejected files/records, and using the Data Review	Upon completion, attendees will be able to identify steps to prepare for the annual tax season, identify items to address with their CES, recognize steps to analyze and resolve rejects from file imports and determine how to use the Data Review Guide.	No pre-requisites	End User	Basic	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TP600 - Hypertherm Success Story: A Hybrid Approach to Transfer Pricing Documentation	11/11/20 10:00 AM	50 Minutes	This session will offer a new and easy way to complete your Transfer Pricing Documentation by combining our economist and a software.	Upon completion, attendees will be able to identify an approach to documentation and recognize the possibility to take it in house.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
TT100B - New User Training – Rolling Up Your Sleeves with ONESOURCE Trust Tax (Part 2)	11/11/20 10:00 AM	50 Minutes	Let us walk you through the basics of using OTT as a new or unseasoned user. This session will give you an understanding of the navigation and grid functionality as well as best practices, tips, and tricks while utilizing the software.	Upon completion, attendees will be able to recognize tools in ONESOURCE Trust Tax that help navigate the grid functionality and identify best practices, tips and tricks that enhance the use of the software.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM210 - New - Tax Return Import/Export (Data Connection) - Import directly into the Organizer	11/11/20 12:00 PM	50 Minutes	See how Tax Return Import/Export can be used to speed up your return preparation and review process. Learn about using this tool to import and export data from the return.	Upon completion, attendees will be able to recognize methods of importing and extracting data from ONESOURCE Income Tax using Tax Return Import/Export Tool.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP620 - Global Tax Management: Tax Provision Year-End Readiness	11/11/20 12:00 PM	50 Minutes	A look into how to tune-up your instance of ONESOURCE Tax Provision in preparation for year-end close encompassing: return-to-provision, payable transactions, maintenance for subcons, trial balance and adjustments, and a	Upon completion, attendees will be able to recognize the steps for year-end readiness and identify methods to efficiently use the system for the process.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT170 - Best Practices using Import and Export Management and Verification	11/11/20 12:00 PM	50 Minutes	Learn the most efficient and effective ways to implement and use Import and Export Management and Import and Export Verification.	Upon completion, attendees will be able to identify the key features of Imp/Exp Mgmt and Imp/Exp Verification, and evaluate how to implement into the workflow.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I130R1 - What's New with ONESOURCE Determination – Original Shared and Original Dedicated cloud (Repeat)	11/11/20 12:00 PM	50 Minutes	Learn about enhancements to our Original applications – Determination, Certificate Manager, and Reporting – to meet indirect tax regulations. We'll discuss the changes we've made in 2020 and give you a preview of additional	Upon completion, attendees will be able to identify updates and additions made to ONESOURCE Indirect Tax to address regulatory gaps and broaden coverage of Indirect Tax logic.	General familiarity with ONESOURCE Indirect Determination.	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical
O120 - Introduction to ONESOURCE Data Hub	11/11/20 12:00 PM	50 Minutes	ONESOURCE Data Hub provides a central data layer to avoid uploading the same data for each application and for each need. Learn how your entire organization can safely store and access data needed for compliance, planning,	Upon completion attendees will be able to recognize the ONESOURCE Data Hub, it's use with ONESOURCE Platform's centralized capabilities, and how to utilize it to import, classify, and promote source data.	No pre-requisites	Administrator	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
O720 - BDO: Using RPA and Alteryx with ONESOURCE	11/11/20 12:00 PM	50 Minutes	In this session we will discuss foundational data governance principles, how to identify candidates for automation, and some RPA/Alteryx use cases. Learn how to leverage the power of ONESOURCE, RPA and Alteryx to deliver on tax	Upon completion of this session attendees will be able to recognize foundational data governance principles, practical use cases where RPA or Alteryx can be impactful; and areas in the tax department that are best suited for automation.	No pre-requisites	End User	Advanced	1	ONESOURCE	Computer Software & Applications – Non-Technical
TI220 - Solving Data Management Issues with Alteryx and ONESOURCE Tax Information Reporting	11/11/20 12:00 PM	50 Minutes	Find out what Alteryx is and how when used together with OTIR, it can expand your automation process, solve data management and reporting issues in a repeatable and easy to configure way.	Upon completion, attendees will be able to identify Alteryx automation capabilities when used with OTIR, and recognize use cases for reporting issues and data management.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical

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TT610 - Excess Deduction on Termination	11/11/20 12:00 PM	50 Minutes	This session will discuss the recent regulations issued by the IRS regarding the character of excess deductions on termination of an estate or trust. The session will cover the background of these proposed regulations and how they apply.	Upon completion, attendees will be able to evaluate the character of excess deduction on terminations and apply the proposed regulations in their tax processing.	At least one year or equivalent experience in fiduciary tax or tax information reporting	End User	Intermediate	1	Trust Tax	Taxes – Technical
DI-DOM500R1 - What's New in ONESOURCE Income Tax (Domestic & International) (Repeat)	11/11/20 1:00 PM	50 Minutes	This session provides an overview of the new features that will be released for clients for the 2020 form year for both domestic and international.	Upon completion, attendees will be able to identify upcoming software enhancements.	General familiarity with ONESOURCE Income Tax	End User	Update	1	Direct Tax	Computer Software & Applications – Non-Technical
DP140 - Interim Functionality and Reporting	11/11/20 1:00 PM	50 Minutes	Learn how to create an interim provision including applying appropriate system setup requirements, data population choices, quarterly-specific steps, and report generation choices within ONESOURCE Tax Provision.	Attendees will be able to identify methods to compute their interim tax provision in ONESOURCE and be able to describe the setup, data population steps, and report choices to compute an annual effective tax rate and apply that rate to actual data.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT140R1 - New Connectors in GTM (Repeat)	11/11/20 1:00 PM	50 Minutes	Learn about our GTM connectors to SAP, Oracle and Infor.	Upon completion, attendees will be able to identify how ONESOURCE GTM connects to SAP and Oracle.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I200 - Building a Tax Automation case, from an Indirect Tax perspective	11/11/20 1:00 PM	50 Minutes	Come learn how to build a tax automation case and how to speak to tax leadership and non-tax people. We'll focus on both soft and hard savings, areas to avoid, and the perspective of tax leadership and non-tax colleagues.	Upon completion, attendees will be able to recognize advantages of automating tax, distinguish between soft vs hard cost savings, identify areas to avoid in discussions, and determine how to respond to resourcing questions.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O200 - The Next Generation of ONESOURCE Calendar	11/11/20 1:00 PM	50 Minutes	Come check out the new functionality available in the next generation of ONESOURCE Calendar. Learn how it can be leveraged to manage due dates and obligations throughout ONESOURCE.	Upon completion, attendees will be able to recognize new functionality and identify methods to manage due dates and obligations.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
O740 - Better Together: Alteryx-ONESOURCE Customer Panel	11/11/20 1:00 PM	50 Minutes	While so much is new and different in 2020, companies are still looking for impactful ways to automate tax processes. Learn the benefits of using an Analytic Process Automation (APA) solution such as Alteryx with ONESOURCE	Upon completion, attendees will be able to recognize the latest advances in tax automation process and technology and apply APA tax use cases deployed for real-world impact, while distinguishing how tax technologists receive project prioritization and resource allocation.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT170 - Permissions Behind the Scenes	11/11/20 1:00 PM	50 Minutes	In this session you will see the process and how to setup permissions. You will see the role that Support plays and what users can do once this process is handed over to users in the future.	Upon completion, attendees will recognize how to complete permission requests, how to assist Support in applying permissions, and how to perform these tasks in the future.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TT240 - ONESOURCE Trust Tax Solutions to TCJA (including Section 199A) and CARES Act	11/11/20 1:00 PM	50 Minutes	In this session, we will review a variety of TCJA and CARES Act topics including: business interest expense limitation, state refund recovery, qualified opportunity fund (QOF), and Treatment and presentation (2020 Regulations).	Upon completion, attendees will be able to identify the necessary input required and system computations/output for various TCJA and CARES Act related items.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM420R1 - State Combined/Consolidated Returns Best Practices (Repeat)	11/11/20 2:00 PM	50 Minutes	This informative session demystifies state combined/consolidated return preparation. Best practices and tips for combined/consolidated returns will be the focus. It is recommended you familiar with the consolidation process within	Upon completion, attendees will be able to recognize state combined/consolidated best practices using ONESOURCE Income Tax.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DI-INTL200R1 - ONESOURCE Income Tax International - Tips and Tricks (Repeat)	11/11/20 2:00 PM	50 Minutes	Discover best practices and solutions for commonly asked questions related to the International module of ONESOURCE Income Tax. Topics discussed will include reconciling the flow of data to forms, avoiding common mistakes, and	Upon completion, attendees will be able to recognize common software questions and their resolution.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DP610 - Deloitte/Cummins: The Journey to Optimize the Tax Provision Process	11/11/20 2:00 PM	50 Minutes	Learn about the Cummins' journey to optimize the tax provision process, including special considerations and lessons learned. Learn how Cummins uses ONESOURCE Tax Provision, Workpapers and Alteryx to collect and analyze	At the conclusion of this session, attendees will be able to recognize the software, processes, and people needed to optimize the Tax Provision process at Cummins; and identify examples of process automation using Tax Provision, Workpapers & Alteryx.	Two or more years experience with Tax Provision processes.	End User	Advanced	1	Direct Tax	Computer Software & Applications – Non-Technical
GT120R1 - Best Practices on Using ONESOURCE FTZ (Repeat)	11/11/20 2:00 PM	50 Minutes	Learn the best way to use ONESOURCE FTZ to manage your zone.	Upon completion, attendees will be able to identify the key features and benefits, and apply them to their FTZ.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I210 - Tips and Tricks Fees, Other Charges, Tax Credits and Prepayments	11/11/20 2:00 PM	50 Minutes	Come see an overview of the new updates to the application's framework that allows you to branch off into fees and other taxes such as Input Tax Credits, bag fees, and prepaid wireless, as well as prepayment support highlighting MO, IL,	Upon completion, attendees will be able to identify enhancements that allow you to branch off into fees and other taxes such as Input Tax Credits, bag fees, and prepaid wireless, as well as prepayment support highlighting MO, IL, AR, and PA.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
I220 - New SAP US Global Tax Service Integrations for SAP S/4HANA AnyPremise and SAP S/4HANA Cloud	11/11/20 2:00 PM	50 Minutes	In this session, we will showcase the Integrations for SAP S/4HANA using the new SAP APIs: US Tax SOAP API and Tax Services API.	Upon completion, attendees will be able to identify integrations for SAP S/4HANA and recognize new APIs released by SAP.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O410 - A Strategic Approach to Content Management Planning for ONESOURCE WorkFlow Manager	11/11/20 2:00 PM	50 Minutes	Learn the necessity of a strategic content management plan, and key considerations in selecting and implementing technology. We will discuss WorkFlow Manager, organizational pressures to adopt additional tools, and	Upon completion, attendees will be able to recognize a content management strategy, the elements that should be considered in the strategy, and the importance of a strategy.	At least one year of experience working with ONESOURCE WorkFlow Manager	Administrator	Intermediate	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT180 - Research and Content	11/11/20 2:00 PM	50 Minutes	This session will present a brief explanation of the R&C team. We will cover the various areas of responsibility and how each team works together to support ONESOURCE Property Tax.	Upon completion, attendees will be able to recognize the R&C team's responsibilities, identify ways to check existing information and steps to request updates.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TI200 - Did You Know? Using ONESOURCE to Its Fullest	11/11/20 2:00 PM	50 Minutes	This session will review functions and features of ONESOURCE that you may not be aware of, but should consider using. Learn how to take advantage of the full functionality of the system.	Upon completion, attendees will be able to identify the functions and features of ONESOURCE Trust Information Reporting and apply them to their own operations.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT250 - 1099 Reporting in ONESOURCE Trust Tax	11/11/20 2:00 PM	50 Minutes	This session will provide a high level view of 1099 reporting using Trust Tax and changes being made for 2020 tax processing. OSMI reporting will also be covered.	Upon completion, attendees will be able to recognize new 1099 functionality in Trust Tax.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM610 - KPMG: From Good to Great – Advanced Strategies for Compliance Automation in ONESOURCE	11/11/20 4:00 PM	50 Minutes	Discussion of leading practices around compliance automation in ONESOURCE Income Tax functionality using Alteryx and APIs highlighting use cases around Federal and International compliance.	Upon completion, attendees will be able to identify where APIs might be used in the compliance architecture and how Alteryx can be incorporated to standardize and improve the use of data in the compliance process.	At least one year experience with compliance processes.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP640 - BDO: Optimizing ONESOURCE Tax Provision - Typical Challenges & Solutions	11/11/20 4:00 PM	50 Minutes	In this session we will identify and discuss common tax provision process challenges and review ONESOURCE Tax Provision configuration options that can streamline these issues.	Upon completion of this session attendees will be able to identify areas in the software that can cause process issues and methods to correct the issues; and, recognize how to enhance the tax provision process using available ONESOURCE	No pre-requisites	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT630 - Update on Forced Labor and Supply Chain Risk	11/11/20 4:00 PM	50 Minutes	Overview of existing forced labor regulations and enforcement actions, as well as how companies can mitigate this supply chain risk.	Upon completion, attendees will be able to interpret rules around Forced Labor and apply those rules to mitigate risk in their supply chain.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I110R1 - Indirect and Property Tax Horizons (Repeat)	11/11/20 4:00 PM	50 Minutes	Join Indirect Tax leaders Ray Grove, VP of Product Management, and Adam Schaffner, Value Proposition, as they cover key industry trends, new opportunities and the strategy for Indirect and Property Tax. This session	Upon completion, attendees will be able to identify trends in the indirect tax market, and recognize the ONESOURCE Indirect Tax strategy evolve and innovate products to meet these needs.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O400 - Tips and Tricks to Get the Most Out of ONESOURCE Calendar	11/11/20 4:00 PM	50 Minutes	Join our ONESOURCE Calendar experts as they show you how to make the most of your Calendar by working with custom fields, reports, and more.	Upon completion, attendees will be able to identify steps to create custom fields, reports, and roll forward events for the next period.	At least one year of experience working with ONESOURCE Calendar.	End User	Intermediate	1	ONESOURCE	Computer Software & Applications – Non-Technical
TT200 - 1041/990 Fed/State Estimates	11/11/20 4:00 PM	50 Minutes	Learn the latest regulatory and system updates for federal/state fiduciary and 990 estimate processing with ONESOURCE Trust Tax.	Upon completion, attendees will be able to identify steps to complete the fiduciary and 990 estimate processing using the Trust Tax system.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM400R1 - Best Practices for Federal Consolidated Returns (Repeat)	11/11/20 5:00 PM	50 Minutes	This session covers best practices for preparing federal consolidated returns. Example items to be discussed are Form 990, Form 7004, as well as consolidating schedules.	Upon completion, attendees will be able to identify best practices for federal consolidations.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT110R1 - Keeping up with Regulatory Changes Using Global Trade Content (Repeat)	11/11/20 5:00 PM	50 Minutes	Learn how to keep up with changing tariffs and regulations for more than 210 countries and territories around the world with Global Trade Content.	Upon completion, attendees will be able to recognize methods to use ONESOURCE Global Trade Content to stay current with changing tariffs and regulations.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
GT170R1 - Best Practices using Import and Export Management and Verification (Repeat)	11/11/20 6:00 PM	50 Minutes	Learn the most efficient and effective ways to implement and use Import and Export Management and Import and Export Verification.	Upon completion, attendees will be able to identify the key features of Imp/Exp Mgmt and Imp/Exp Verification, and evaluate how to implement into the workflow.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
O200R1 - The Next Generation of ONESOURCE Calendar (Repeat)	11/12/20 7:00 AM	50 Minutes	Come check out the new functionality available in the next generation of ONESOURCE Calendar. Learn how it can be leveraged to manage due dates and obligations throughout ONESOURCE.	Upon completion, attendees will be able to recognize new functionality and identify methods to manage due dates and obligations.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
EU600 - Tax Engines – An Essential Technology for European Organisations	11/12/20 8:00 AM	50 Minutes	In this session we will discuss how ONESOURCE Indirect Tax Determination can help businesses meet the challenge of the increasingly complex European tax environment as VAT rates change in UK, Ireland and Germany and new digital tax reporting regulations impact the compliance process.		No pre-requisites	Any User	Basic	0	Indirect Tax	N/A
DC640R1 – Cowen Inc, Orbitax, TR: “Hallmark” strategies to stay ahead of DAC6 / MDR (Repeat)	11/12/20 8:00 AM	50 Minutes	Hear how to prepare clients to stay ahead of DAC6 and the anticipated avalanche of MDR rules to come. COWEN INC. will share their DAC6 implementation journey & strategy in order to meet all forthcoming due dates	Upon completion, attendees will be able to recognize the DAC6 compliance requirements and determine an implementation strategy to meet due dates and filing deadlines.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-DOM210R1 - New - Tax Return Import/Export (Data Connection) - Import directly into the Organizer (Repeat)	11/12/20 8:00 AM	50 Minutes	See how Tax Return Import/Export can be used to speed up your return preparation and review process. Learn about using this tool to import and export data from the return.	Upon completion, attendees will be able to recognize methods of importing and extracting data from ONESOURCE Income Tax using Tax Return Import/Export Tool.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP110R1 - Tax Basis Balance Sheet and Income Statement (Repeat)	11/12/20 8:00 AM	50 Minutes	Create lines and sublines for the tax basis balance sheet structure, import lines and sublines, enter account data manually, bridge account data from a GL system, create a temporary difference layer onto accounts, and more.	Upon completion, attendees will be able to identify the steps and activities to create a tax basis balance sheet structure and the alternative methods for entering data for the accounts in the structure.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
I280 - Introduction and Best Ways to Use ONESOURCE Indirect Compliance for VAT & GST	11/12/20 8:00 AM	50 Minutes	Want to learn basic features and easy ways to use ONESOURCE Indirect Compliance for VAT & GST? This session will show you key benefits and commonly performed tasks. You'll also see additional resources available to you	Upon completion, attendees will be able to identify the benefits of common processes when using ONESOURCE Indirect Compliance for VAT & GST.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
DI-DOM410R1 - ONESOURCE Income Tax: Did You Know? (Repeat)	11/12/20 9:00 AM	50 Minutes	Have you heard of the Federal Adjustment Workpaper, Enterprise Control Panel, State TI Workpapers? Do you know how to subview member binders? If not, then this is the session for you. This session will cover many tips to help you	Upon completion, attendees will be able to recognize features of ONESOURCE Income Tax, RS version.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP150R1 - Deferred Tax Presentations (Repeat)	11/12/20 9:00 AM	50 Minutes	This session covers the use of activity, deferred-only and balance-sheet-only data entry fields for temporary differences as well as the calculation and presentation of those temporary differences on the Deferred Balances report.	Upon completion, attendees will be able to identify the steps for the creation of user-defined columnar expansion and the adjustment rollup functionality for the deferred balances report.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
I230 - Around the World with Global Indirect Tax Research and Content	11/12/20 9:00 AM	50 Minutes	Come see an overview by the Tax Research and Content Team of major regulatory changes in Global Indirect Tax and a preview of upcoming changes.	Upon completion, attendees will be able to identify major regulatory changes in Global Indirect Tax and recognize upcoming changes.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TP610 - ONESOURCE Transfer Pricing Suite Highlights, Strategy, and Roadmap	11/12/20 9:00 AM	50 Minutes	This session will get you up to speed on the latest developments and future plans across Operational Transfer Pricing, BEPS Action Manager, and Documenter (including NextGen).	Upon completion, attendees will be able to identify recent enhancements and recognize the strategy for the future-state of the ONESOURCE Transfer Pricing Suite.	General knowledge of the ONESOURCE Transfer Pricing suite	End User	Update	1	Direct Tax	Computer Software & Applications – Non-Technical
TT210 - 1042-S Processing from A to Z	11/12/20 9:00 AM	50 Minutes	Learn the latest regulatory and system updates for 1042-S processing with ONESOURCE Trust Tax.	Upon completion, attendees will be able to identify steps to complete NRA 1042-S reporting using the Trust Tax system.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM110R1 - An Overview of the Federal and State E-File Process (Repeat)	11/12/20 10:00 AM	50 Minutes	The course will cover the basics of electronic filing for federal and state returns.	Upon completion, attendees will be able to identify steps to electronically file federal and state returns in ONESOURCE Income Tax.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-INTL220R1 - Tracking E&P, Tax Pools and other advanced topics for Foreign Entity Processing (Repeat)	11/12/20 10:00 AM	50 Minutes	The Tax Cuts and Jobs Act introduced many changes to the tracking and reporting of E&P and tax information. This session will show you how to review current year activity and the history of your E&P and taxes through reports and We will identify the steps included in calculating the tax journal entry, core calculation, v2016 JE profiles, sample JE calculations, configurable JE module, simple JE, custom JE, generating and posting of the JE, and closed-loop	Upon completion, attendees will be able to recognize best practices for E&P tracking using ONESOURCE Income Tax, RS version.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
DP230R1 - Journal Entry Functionality and Reporting (Repeat)	11/12/20 10:00 AM	50 Minutes	Discover how to maximize the automation capabilities to complete the provision process by using the JE, Payable, and reporting functionality for the Tax Account Rollforward. Apply the concepts and tools discussed to enhance your	Upon completion, attendees will be able to recognize the general functionality of the ONESOURCE Tax Provision journal entry process, and identify steps to generate a report to book entries in the general ledger for the provision results.	At least one year of experience with ONESOURCE Tax Provision	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP660 - Crowe: Automating the JE, Payable and Tax Account Rollforward Process and Reporting	11/12/20 10:00 AM	50 Minutes	Using Smart HS (Artificial Intelligence) in your classification process and other advanced features of Global Classification.	Upon completion of this session attendees will be able to recognize the automation benefits; evaluate the best options that meet the scenario requirements; and apply the automation functionality to facilitate the income tax provision process.	No pre-requisites	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
GT150 - Global Classification and Smart HS Update	11/12/20 10:00 AM	50 Minutes	Disruptive forces such as globalization, transparency and digitalization are changing the role of the tax function and tax professionals. Come learn how tax departments are shifting from compliance focused to a more strategic operating	Upon completion, attendees will be able to recognize the steps to use Smart HS and recognize key features of Global Classification.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I240 - Future of Tax Professionals: How to Stay Relevant in Changing Times	11/12/20 10:00 AM	50 Minutes	Implementing Technology – how to be successful? Join our implementation experts and your peers while they share best practices and lessons learned after implementing tax technology.	Upon completion, attendees will be able to identify disruptive technologies impacting the future of tax, identify skills required to succeed in the new tax world and recognize how to recruit, develop, retain or retool tax talent	At least one year experience as a Tax Professional.	End User	Intermediate	1	Indirect Tax	Computer Software & Applications – Non-Technical
O630 - Wex & TR: New Tax Software, Now What? Tips for a Smoother Tech Implementation	11/12/20 10:00 AM	50 Minutes	This session will present an overview of ONESOURCE Property Tax recent key developments as well as a preview of future enhancements.	Upon completion, attendees will be able to identify an implementation communication strategy, recognize the importance of Training, apply Implementation planning techniques and recognize strategies for involvement of IT with tech	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT110R1 - What's New with ONESOURCE Property Tax (Repeat)	11/12/20 10:00 AM	50 Minutes	Find out what Alteryx is and how when used together with OTIR, it can expand your automation process, solve data management and reporting issues in a repeatable and easy to configure way.	Upon completion attendees will be able to identify enhancements released in the ONESOURCE Property Tax software during 2020 as well as recognize future initiatives.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
TI220R1 - Solving Data Management Issues with Alteryx and ONESOURCE Tax Information Reporting (Repeat)	11/12/20 10:00 AM	50 Minutes	Experience the power and ease of a one-stop solution allowing users to review and analyze partnership K-1 data and ultimately import into ONESOURCE Trust Tax.	Upon completion, attendees will be able to identify Alteryx automation capabilities when used with OTIR, and recognize use cases for reporting issues and data management.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT120 - Using K-1 Analyzer to Simplify the Review and Analysis of your Partnership K-1s	11/12/20 10:00 AM	50 Minutes	This course examines three perspectives on how to best help provide MNE tax departments with the tools to keep up with the complexities of globalization & digitalization of businesses to frequently changing tax rules.	Upon completion, attendees will be able to identify the efficiencies and possible risk reduction benefits they can gain from using K-1 Analyzer.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
DC650R1 - Changing International Tax Regimes and How Technology Can Help (Repeat)	11/12/20 12:00 PM	50 Minutes	Learn how to import and extract organizer data into ONESOURCE Income Tax using ONESOURCE Workpapers. ONESOURCE Workpapers is frequently used to assist with data entry for the new international forms.	Upon completion, attendees will be able to recognize how the globalization and digitization of business has impacted frequently changing tax rules and regulations, and identify methods to use technology to keep up with changes as they increase in	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-DOM120R1 - Using ONESOURCE Workpapers (Repeat)	11/12/20 12:00 PM	50 Minutes	This session covers the automated methodology for representing return to provision entries in ONESOURCE Tax Provision, federal and state; and system requirements to identify and post true-up items into the current provision.	Upon completion attendees will be able to use ONESOURCE Workpapers to populate the organizer.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP120R1 - Return to Provision True Up (Repeat)	11/12/20 12:00 PM	50 Minutes	Review the status of Brexit and learn how it will affect trade with the UK.	Upon completion, attendees will be able to identify the steps required for the system to calculate and post true-up amounts in the current provision data set.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT610R1 - Brexit Update: Trade with the UK (Repeat)	11/12/20 12:00 PM	50 Minutes	Come see an overview of how ONESOURCE Determination interacts with Sales and Use and VAT Compliance as well as a preview of future updates to enhance the tax return preparation process.	Upon completion, attendees will be able to evaluate how Brexit will affect their supply chains and identify opportunities with trade with the UK.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I290 - Indirect Tax and Global Compliance	11/12/20 12:00 PM	50 Minutes	A tax engine implementation is a huge undertaking for organizations with a complex tax footprint, especially where multiple systems are connected. The latest technology developments in RPA help complex tax engine	Upon completion, attendees will be able to identify how calculated tax within Determination interacts within the global compliance process as well as recognize future initiatives to enhance the process.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
I600 - Grant Thornton: RPA-based Tax Engine Implementation	11/12/20 12:00 PM	50 Minutes	This session will provide a view into various methods of using Alteryx to build automated audit ready workpapers while maintaining transparency into calculations.	Upon completion, attendees will be able to recognize the nuances of a tax engine implementation, identify typical problems, and apply the latest RPA technology to streamline the tax engine implementation.	At least one year of experience with RPA and tax engine implementation.	End User	Intermediate	1	Indirect Tax	Information Technology – Technical
O690 - EY: Workpaper Excellence: Learn How a Client Used Alteryx to Drive Workpaper Automation	11/12/20 12:00 PM	50 Minutes	Learn about changes coming to ONESOURCE Tax Information Reporting for the 2020 tax season resulting from regulatory changes, plus other product updates and enhancements.	Upon completion, attendees will be able to identify methods to build automated workpapers to streamline compliance processes and recognize ONESOURCE and Alteryx tools available to create custom solutions to reduce prep and review time.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
TI500R1 - What's New in ONESOURCE Tax Information Reporting - A Product Update (Repeat)	11/12/20 12:00 PM	50 Minutes	This session will discuss several wealth transfer techniques and utilization of GST exemptions.	Upon completion, attendees will be able to identify the regulatory changes being implemented in the system for the upcoming tax season and recognize the benefits of the new features and how they will assist with tax form preparation and filing.	General familiarity with ONESOURCE Tax Information Reporting product functionality	End User	Update	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT630 - What Low Interest Rates, Gift/Estate Tax/GST Exemptions and Baby Boomers Have in Common?	11/12/20 12:00 PM	50 Minutes	Upon completion, attendees will be able to identify wealth transfer techniques and utilize GST exemption.	At least one year or equivalent experience in fiduciary tax or tax information reporting	End User	Intermediate	1	Trust Tax	Taxes – Technical	

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
DI-DOM620 - KPMG: Achieving Your Ideal State – Strategies for State Compliance Automation in ONESOURCE	11/12/20 1:00 PM	50 Minutes	Learn about leading practices in state compliance automation for ONESOURCE Income Tax, including use cases for ONESOURCE State Apportionment, like details of state modification automation and solution architecture specific to that Apportionment.	Upon completion, attendees will be able to identify methods to use automation for state compliance in ONESOURCE Income Tax and ONESOURCE State Apportionment.	At least one year experience processing state returns.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-HNTL110R1 - Processing GILTI through ONESOURCE Income Tax (Repeat)	11/12/20 1:00 PM	50 Minutes	Learn how to process Global Intangible Low-Taxed Income (GILTI) through ONESOURCE Income Tax from data entry, through calculations and reports, to reporting information on forms.	Upon completion, attendees will be able to recognize methods to process GILTI using ONESOURCE Income Tax.	No pre-requisites	End User	Basic	1	Direct Tax	Taxes – Technical
DP100R1 – ONESOURCE Tax Provision Version 2016 Basics (Repeat)	11/12/20 1:00 PM	50 Minutes	During this lecture, we will orient attendees to the look of Tax Provision covering the navigation paradigms, data review functions, drill-down capabilities, as well as data entry and transfer functionality.	Upon completion, attendees will be able to identify the navigation steps and processes associated with the v2016 ONESOURCE Tax Provision application.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT400R1 - Best Practices: Training Makes For Better Compliance (Repeat)	11/12/20 1:00 PM	50 Minutes	Learn how to implement an online self study training program, into your trade compliance program.	Upon completion, attendees will be able to apply the steps needed to implement an online self-study training program on trade.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I260 - Enhancements on Oracle ERP Cloud (Fusion) Integration	11/12/20 1:00 PM	50 Minutes	See what's new on our Oracle ERP Cloud Integration with ONESOURCE Determination, including Content and New ERP modules support.	Upon completion, attendees will be able to identify new features added to Oracle ERP Cloud Integrations and recognize methods to expand tax calculation usage with this ERP and the standard AP and AR transactions.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O510 - ONESOURCE Platform and Administration – What's Next?	11/12/20 1:00 PM	50 Minutes	Session to understand the long-term vision of the ONESOURCE Platform. In the session, we will go through capabilities released throughout 2020 and how those are shaping the strategy we have for the ONESOURCE Platform.	Upon completion, attendees will be able to recognize features released for ONESOURCE Platform and Administration and the future strategy.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
TT260 - Solving Data Management Issues with Alteryx and ONESOURCE Trust Tax	11/12/20 1:00 PM	50 Minutes	Find out what Alteryx is and how when used together with OTT, it can expand your automation process, solves most data management and reporting issues in a repeatable and easy to configure way.	Upon completion, attendees will be able to identify what Alteryx is and recognize use cases where it may help solve data management and reporting issues.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM100R1 - Preparing State Returns in ONESOURCE Income Tax (including State A&A and State TI) (Repeat)	11/12/20 2:00 PM	50 Minutes	For users with less than one year's experience using ONESOURCE Income Tax, RS version, this session covers the basics through to processing a state return. Learn how to enter A&A and modification data, use Organizer, and	Upon completion, attendees will be able to recognize the steps for completing state returns using ONESOURCE Income Tax.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP160R1 - Global Access Manager (Repeat)	11/12/20 2:00 PM	50 Minutes	We will cover the web-based Global Access module of ONESOURCE Tax Provision – data gathering screens, available reports, sign-off sequence, questionnaires, and user setup including v2014 group functionality.	Upon completion, attendees will be able to identify the fundamental features and functionality of the web-based Global Access module of ONESOURCE Tax Provision.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT620 - USMCA: Lessons Learned and Future FTAs	11/12/20 2:00 PM	50 Minutes	This session will focus on lessons learned from USMCA and on future FTAs.	Upon completion, attendees will be able to identify positives and negatives about USMCA as well as compare and contrast to future FTAs.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I120R1 - What's New with ONESOURCE Determination – Shared and Dedicated Cloud (Repeat)	11/12/20 2:00 PM	50 Minutes	This session will review the enhancements made to IDT Cloud over the last year. Learn about the design concepts, functional changes and new features of Indirect Tax on the ONESOURCE platform.	Upon completion, attendees will be able to identify design concepts and functional product changes, recognize new terminology and planned enhancements to the Indirect Tax user experience.	General familiarity with ONESOURCE IDT Cloud.	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical
I270 - Tips and Tricks Credits and Suspensions CA e-File, and Remote Sellers Support	11/12/20 2:00 PM	50 Minutes	Come see an overview of Credits and Suspensions, CA Electronic Filing, as well as our newly added Remote Sellers Support highlighting AZ and LA.	Upon completion, attendees will be able to recognize functionality related to Credits and Suspensions, CA electronic filing, and built in remote sellers capabilities.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O210 - The Next Generation of Data Collection in ONESOURCE - DataFlow	11/12/20 2:00 PM	50 Minutes	Learn more about the next generation of DataFlow. See how new technology will better position your organization to improve efficiencies and increase both the control and accuracy of your data collection process.	Upon completion, attendees will be able to recognize the evolution of the next generation tool, improvements to the user experience and new functionality, and analyze the value it can bring to processes.	At least one year of working with ONESOURCE DataFlow	Administrator	Intermediate	1	ONESOURCE	Computer Software & Applications – Non-Technical
PT120R1 - ONESOURCE Property Tax Modernization (Repeat)	11/12/20 2:00 PM	50 Minutes	This session will provide an overview of several updates to the new user interface for ONESOURCE Property Tax.	Upon completion, attendees will be able to recognize enhancements to the design and layout of ONESOURCE Property Tax.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
T1600 - State Tax Information Filing Obligations (Forms 1099 and equivalents)	11/12/20 2:00 PM	50 Minutes	This session will review state tax information reporting concepts, including the combined fed/state Form 1099 filing program. Key state tax information reporting obligations in jurisdictions that fall outside this program will be addressed.	Upon completion, attendees will be able to recognize concepts of the federal/state 1099 filing program and identify key state tax information reporting obligations.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Taxes – Technical
TT500R1 - What's New in ONESOURCE Trust Tax - A Product Update (Repeat)	11/12/20 2:00 PM	50 Minutes	Learn about changes coming to ONESOURCE Trust Tax for the 2020 tax season resulting from regulatory changes, plus other product updates and enhancements.	Upon completion, attendees will be able to identify the regulatory changes being implemented into the system for the upcoming tax season and recognize the benefits of the new features which will assist with tax preparation and filing.	General familiarity with ONESOURCE Trust Tax product functionality	End User	Update	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM650 - Grant Thornton: State Tax Law Update	11/12/20 4:00 PM	50 Minutes	Learn about the latest developments in state income tax legislation and administrative guidance including state rule updates, state economic nexus standards for income tax, new mandatory combined reporting rules, and state	Upon completion of this session, attendees will be able to recognize developments in state conformity to Federal tax law; identify actions to comply with rule changes applicable to state income tax returns; and evaluate the impact of these changes.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP130R1 – ONESOURCE Workpapers Basics (Repeat)	11/12/20 4:00 PM	50 Minutes	We will cover the Workpaper Add-In ribbon and Workpaper Manager area of the ONESOURCE platform. Existing Active Workpaper customers will benefit from the discussion covering the upgrade to ONESOURCE Tax Provision	Upon completion, attendees will be able to identify the key features, benefits, and navigational processes for the ONESOURCE Workpapers application.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP190R1 - Tax Provision Integrations (Repeat)	11/12/20 4:00 PM	50 Minutes	A review of the data that can be integrated between Tax Provision and other applications in the ONESOURCE Suite as well as review of the process	Upon completion, attendees will be able to identify the data that can be integrated between Tax Provision and other applications in the ONESOURCE Suite and apply the process to their data.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
GT130R1 - GTM Customer Support Update: Tips and Tools (Repeat)	11/12/20 4:00 PM	50 Minutes	This session will cover ONESOURCE GTM customer support, such as case reduction goals, how to use self-help tools and the ticketing system.	Upon completion, attendees will be able to recognize steps to submit support ticket, use self help tools and efficiently interact with customer support.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
I190R1 - Introduction to Indirect Tax Next Generation Reporting and Analytics (Repeat)	11/12/20 4:00 PM	50 Minutes	Learn about the next generation of Reporting for Indirect Tax. See the new way to access ONESOURCE Determination audit data, starter reports, how to build custom reports, data visualization functionality and APIs to export data to other	Upon completion, attendees will be able to identify new functionality of Reporting for Indirect Tax, and recognize methods to apply the functionality to data management issues.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
O750 - Uniting EY's Connected Tax Gateway & ONESOURCE Calendar API to Enable Remote Collaboration	11/12/20 4:00 PM	50 Minutes	Remotely accessible and built in Microsoft® SharePoint, EY's Connected Tax Gateway is the gateway to the intelligent tax function. Leveraging the ONESOURCE Calendar API, the CTG provides task, document and resource	Upon completion of this session, attendees will be able to recognize features of EY's Connected Tax Gateway and recognize methods to leverage the ONESOURCE Calendar API.	No pre-requisites	End User	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
TI400 - Best Practices for Managing Your Tax Season	11/12/20 4:00 PM	50 Minutes	This session will review best practices derived from supporting many clients through past tax information reporting seasons successfully. Learn common mistakes to avoid, and the key actions that can make your tax season easier and	Upon completion, attendees will be able to identify productive ways of managing operational processes to help make their tax season much easier and determine processes to apply to avoid common mistakes.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT620 - COVID-19's Impact on Closely Held Entities in an Estate	11/12/20 4:00 PM	50 Minutes	Learn more about the impact of COVID-19 on the valuation of a closely held entity in an estate. Valuation of the entity, discounts, and other considerations that executors of estates need to consider.	Upon completion, attendees will be able to identify issues that executors of estates need to consider when valuing closely held entities.	At least one year or equivalent experience in fiduciary tax or tax information reporting	End User	Intermediate	1	Trust Tax	Taxes – Technical
DI-DOM430R1 - Getting the Most from Common State Best Practices (Repeat)	11/12/20 5:00 PM	50 Minutes	Learn best practices and tips for getting the most from Common State Best Practices. See how this can be used to speed up your state return preparation and review process.	Upon completion, attendees will be able to recognize common state best practices using ONESOURCE Income Tax.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Taxes – Technical
GT600R1 - The Presidential Election: What's Next for Global Trade? (Repeat)	11/12/20 5:00 PM	50 Minutes	Discussion of how the US presidential election will affect trade policy.	Upon completion, attendees will be able to evaluate how the next president's trade agenda could possibly affect the supply chain.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
DP500R1 - Next Gen Tax Provision Overview (Repeat)	11/12/20 6:00 PM	50 Minutes	Explore the future of ONESOURCE Tax Provision using an API-based calculation engine and self-service reporting interface.	Upon completion, attendees will be able to recognize the features of Tax Provision and Global Access reporting using an API-based calculation engine and a self-service reporting interface.	At least two years of experience with ONESOURCE Tax Provision	End User	Advanced	1	Direct Tax	Computer Software & Applications – Non-Technical
GT150R1 - Global Classification and Smart HS Update (Repeat)	11/12/20 6:00 PM	50 Minutes	Using Smart HS (Artificial Intelligence) in your classification process and other advanced features of Global Classification.	Upon completion, attendees will be able to recognize the steps to use Smart HS and recognize key features of Global Classification.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
GT620R1 - USMCA: Lessons Learned and Future FTAs (Repeat)	11/13/20 7:00 AM	50 Minutes	This session will focus on lessons learned from USMCA and on future FTAs.	Upon completion, attendees will be able to identify positives and negatives about USMCA as well as compare and contrast to future FTAs.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
I160R1 - What's New with ONESOURCE Indirect Compliance for VAT & GST (Repeat)	11/13/20 7:00 AM	50 Minutes	Come see an overview of ONESOURCE Indirect Compliance for VAT & GST recent key developments, as well as a preview of future enhancements.	Upon completion, attendees will be able to identify enhancements released in the ONESOURCE Indirect Compliance for VAT & GST software and recognize future initiatives.	General familiarity with ONESOURCE Indirect Tax Compliance	End User	Update	1	Indirect Tax	Computer Software & Applications – Non-Technical
O120R1 - Introduction to ONESOURCE Data Hub (Repeat)	11/13/20 7:00 AM	50 Minutes	ONESOURCE Data Hub provides a central data layer to avoid uploading the same data for each application and for each need. Learn how your entire organization can safely store and access data needed for compliance, planning, Technology can enable transformation, supporting the move to a Shared Service Centre or Centre of Excellence, and as part of the global trend towards finance transformation, statutory reporting is proven to be a process that benefits	Upon completion attendees will be able to recognize the ONESOURCE Data Hub, it's use with ONESOURCE Platform's centralized capabilities, and how to utilize it to import, classify, and promote source data.	No pre-requisites	Administrator	Basic	1	ONESOURCE	Computer Software & Applications – Non-Technical
EU610 - The Transformation Evolution – Harmonising Global Statutory Financial Reporting	11/13/20 8:00 AM	50 Minutes	Overview of existing forced labor regulations and enforcement actions, as well as how companies can mitigate this supply chain risk.	Upon completion, attendees will be able to interpret rules around Forced Labor and apply those rules to mitigate risk in their supply chain.	No pre-requisites	Any User	Basic	0	Statutory Reporting	N/A
GT630R1 - Update on Forced Labor and Supply Chain Risk (Repeat)	11/13/20 8:00 AM	50 Minutes	Want to learn basic features and easy ways to use ONESOURCE Indirect Compliance for VAT & GST? This session will show you key benefits and commonly performed tasks. You'll also see additional resources available to you	Upon completion, attendees will be able to identify the benefits of common processes when using ONESOURCE Indirect Compliance for VAT & GST.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
I280R1 - Introduction and Best Ways to Use ONESOURCE Indirect Compliance for VAT & GST (Repeat)	11/13/20 8:00 AM	50 Minutes	ONESOURCE Income Tax allows for flexibility when importing and exporting data. Understanding the format required and knowing the most effective way to import and export data will save several hours during the compliance process. Learn how to create an interim provision including applying appropriate system setup requirements, data population choices, quarterly-specific steps, and report generation choices within ONESOURCE Tax Provision.	Upon completion of this session attendees will be able to recognize import/export options available for OIT (Batch, Excel Add-In, Data Connection and OTP transfer); and identify methods to select the best option to use based on the circumstances.	No pre-requisites	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DI-DOM640-Crowe: Discover Available Options for Importing & Exporting Data into ONESOURCE Income Tax	11/13/20 9:00 AM	50 Minutes	Attendees will be able to identify methods to compute their interim tax provision in ONESOURCE and be able to describe the setup, data population steps, and report choices to compute an annual effective tax rate and apply that rate to actual data.	Attendees will be able to identify methods to compute their interim tax provision in ONESOURCE and be able to describe the setup, data population steps, and report choices to compute an annual effective tax rate and apply that rate to actual data.	No pre-requisites	End User	Basic	1	Direct Tax	Computer Software & Applications – Non-Technical
DP140R1 - Interim Functionality and Reporting (Repeat)	11/13/20 9:00 AM	50 Minutes	Come see an overview of the latest product changes, enhancements, and features as well as future release items and new product offerings related to ERP and systems integrations.	Upon completion, attendees will be able to identify new features and determine the value they can provide, and evaluate which release version to use.	No pre-requisites	End User	Basic	1	Indirect Tax	Computer Software & Applications – Non-Technical
I140R1 - ONESOURCE Indirect Tax Integrations: Current State and Future Vision (Repeat)	11/13/20 9:00 AM	50 Minutes	Learn more about the next generation of DataFlow. See how new technology will better position your organization to improve efficiencies and increase both the control and accuracy of your data collection process.	Upon completion, attendees will be able to recognize the evolution of the next generation tool, improvements to the user experience and the new functionality, and determine the value it brings to their processes.	At least one year of working with ONESOURCE DataFlow	Administrator	Intermediate	1	ONESOURCE	Computer Software & Applications – Non-Technical
TT220 - Federal & State E-File and E-Pay: A Review and What's New Filing Federal Extensions in OTT	11/13/20 9:00 AM	50 Minutes	This session will review filing, payment options, and registers for Federal and State electronic filing.	Upon completion, attendees will be able to determine steps necessary to e-file federal and state returns using ONESOURCE Trust Tax.	At least one year or equivalent experience using the ONESOURCE Trust Tax product	End User	Intermediate	1	Trust Tax	Computer Software & Applications – Non-Technical
DI-DOM200R1 - Using Data Query for Reporting (Repeat)	11/13/20 10:00 AM	50 Minutes	See how data query can be used to speed up your federal return preparation and review process. Learn about some reports you can create and use over and over again to quickly access much-needed data for your federal, state and	Upon completion, attendees will be able to recognize methods of extracting data from ONESOURCE Income Tax using data query.	At least one year of experience with ONESOURCE Income Tax.	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
DP360R1 - Advanced Topics in Tax Provision (Repeat)	11/13/20 10:00 AM	50 Minutes	This session will explore advanced functionality in Tax Provision V2016. We will cover advanced reporting, administration and various other topics.	Upon completion, attendees will be able to recognize advanced functionality in Tax Provision v2016.	At least two years of experience with ONESOURCE Tax Provision	End User	Advanced	1	Direct Tax	Computer Software & Applications – Non-Technical
GT160R1 - What is New in Screening and Clear? (Repeat)	11/13/20 10:00 AM	50 Minutes	Learn what is new in DPS solution and CLEAR, online investigative software that helps you complete your know your customer research.	Upon completion, attendees will be able to identify the steps to screen customers using DPS and evaluate how CLEAR strengthens supply chain security.	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
TI200R1 - Did You Know? Using ONESOURCE to its Fullest (Repeat)	11/13/20 10:00 AM	50 Minutes	This session will review functions and features of ONESOURCE that you may not be aware of, but should consider using. Learn how to take advantage of the full functionality of the system.	Upon completion, attendees will be able to identify the functions and features of ONESOURCE Trust Information Reporting and apply them to their own operations.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT130 - Integrating APIs into Your Fiduciary Tax Return Processing	11/13/20 10:00 AM	50 Minutes	Find out the answer to the question "What is an API?" and how API technology can make your fiduciary tax processing on ONESOURCE Trust Tax more automated and efficient.	Upon completion, attendees will be able to identify APIs and recognize how to utilize APIs to streamline fiduciary tax return processing using ONESOURCE Trust Tax.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
GT100R1 - Exploring GTM Platform Tools and Zone Health Checks (Repeat)	11/13/20 12:00 PM	50 Minutes	Explore Platform Tools, such as BPM, Report Builder, Look up, etc., and learn about our Zone Health Checks	Upon Completion, attendees will be able to identify how Platform Tools can enhance user experience and recognize the benefits of Zone Health Checks	No pre-requisites	End User	Basic	1	GTM	Computer Software & Applications – Non-Technical
TI400R1 - Best Practices for Managing Your Tax Season (Repeat)	11/13/20 12:00 PM	50 Minutes	This session will review best practices derived from supporting many clients through past tax information reporting seasons successfully. Learn common mistakes to avoid, and the key actions that can make your tax season easier and	Upon completion, attendees will be able to identify productive ways of managing operational processes to help make their tax season much easier and determine processes to apply to avoid common mistakes.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT100AR1 - New User Training – Rolling Up Your Sleeves with ONESOURCE Trust Tax (Part 1)(Repeat)	11/13/20 12:00 PM	50 Minutes	Let us walk you through the basics of using OTT as a new or unseasoned user. This session will give you an understanding of the navigation and grid functionality as well as best practices, tips, and tricks while utilizing the software.	Upon completion, attendees will be able to recognize tools in ONESOURCE Trust Tax that help navigate the grid functionality and identify best practices, tips and tricks that enhance the use of the software.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
DP240R1 - Flow-Through Functionality (Repeat)	11/13/20 1:00 PM	50 Minutes	We will provide instruction around configuring flow-through profiles, assigning profiles and percentages to units, and validating flow-through entries. We will demonstrate how flow-through can address CFCs, DREs, Branches, and	Upon completion, attendees will be able to identify the general concepts of Version 2016's flow-through functionality and determine the best use cases for this functionality.	At least one year of experience with ONESOURCE Tax Provision	End User	Intermediate	1	Direct Tax	Computer Software & Applications – Non-Technical
TI210 - Integrating APIs into Your Tax Operations	11/13/20 1:00 PM	50 Minutes	This session will explain what an API is and the benefits that APIs can provide. You'll gain an understanding of how to utilize these services in your tax operations. We'll review the plan to transition from existing Web Services to	Upon completion, attendees will be able to identify examples of how APIs can be used in an information reporting tax operation and recognize the benefits they can offer.	At least one year or equivalent experience using the ONESOURCE Tax Information Reporting product	End User	Intermediate	1	Tax Information Reporting	Computer Software & Applications – Non-Technical
TT100BR1 - New User Training – Rolling Up Your Sleeves with ONESOURCE Trust Tax (Part 2)(Repeat)	11/13/20 1:00 PM	50 Minutes	Let us walk you through the basics of using OTT as a new or unseasoned user. This session will give you an understanding of the navigation and grid functionality as well as best practices, tips, and tricks while utilizing the software.	Upon completion, attendees will be able to recognize tools in ONESOURCE Trust Tax that help navigate the grid functionality and identify best practices, tips and tricks that enhance the use of the software.	No pre-requisites	End User	Basic	1	Trust Tax	Computer Software & Applications – Non-Technical
Corporate Legal Departments										
LT100A - Welcome & Acritas Consulting Keynote: Planning for the Unpredictable	11/11/20 11:00 AM	50 Minutes	Despite drastic changes, legal department objectives have remained steady. The shift is how legal departments achieve these goals. This keynote will focus on how spend and staffing trends are shifting, the most important metrics in		No pre-requisites	Any User	Basic	0		N/A
LT110 - Reporting, Part 1	11/11/20 12:00 PM	50 Minutes	Overview Tracker reporting and then review basic reporting tips and tricks (finding fields, using filters, using report scheduler, etc.). We will also review how to use and modify pre-configured Tracker reports.		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A
LT510 - Optimizing Timekeeper Rate Review, Part 1	11/11/20 12:00 PM	50 Minutes	This comprehensive sessions will provide a high-level overview of TKRR, including setting up configurations, communication with firms and rate upload options. We will also discuss roll-out plans like reports to run and data clean up.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT610 - 2020 LDO Index – Benchmarks and Strategies to Optimize Performance	11/11/20 12:00 PM	50 Minutes	This conversational session with Irene Liu, GC at Checkr, will discuss the latest trends in legal operations, spend management and legal technology.		No pre-requisites	Any User	Panel	0	Legal Tracker	N/A
LT210 - Reporting, Part 2	11/11/20 1:00 PM	50 Minutes	Building on Reporting, Part 1, we will dive deep into building key reports many legal departments use frequently, including: timekeeper rates, custom pending invoices and invoice review, and pre-configured/custom trending reports.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT520 - Optimizing Timekeeper Rate Review, Part 2	11/11/20 1:00 PM	50 Minutes	This session will feature a panel of Tracker clients discussing how they are using timekeeper rate data to drive cost savings within their legal department.		No pre-requisites	Any User	Panel	0	Legal Tracker	N/A
LT620 - Legal Ops 101	11/11/20 1:00 PM	50 Minutes	This session will overview the key initiatives a new legal ops department or leader should consider to make a big impact on their business.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT410 - Let Tracker Help You!	11/11/20 2:00 PM	50 Minutes	This session will cover fundamental Tracker features that are designed to assist you with Administering your database, including an overview of core Tracker configurations and then a deep dive on specific topics.		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A

Session Catalog

Session Title	Start Date & Time	Duration	Description	Learning Objectives	Prerequisites	Learner Category	Program Level	CPE Credits	Product Line	Field of Study
LT530 - How to Know if You Need to Optimize Tracker	11/11/20 2:00 PM	50 Minutes	If you suspect your Tracker database could use a refresh, this session will provide recommendations for how to review your Tracker instance to know if it is time for an optimization.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT670 - Legal Hold Without Headaches	11/11/20 2:00 PM	50 Minutes	Organizations deal with lawsuits all the time – from workplace discrimination, overtime pay, customer injuries sustained on-premises, intellectual property, contracts and more. To resolve claims, organizations need proof of who said or		No pre-requisites	End User	Intermediate	0	Legal Tracker	N/A
LT100B - Product Roadmap	11/12/20 11:00 AM	50 Minutes	Learn about the exciting recent and upcoming Legal Tracker product developments for corporate legal departments!		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A
LT120 - Getting the Most out of Law Firm Profiles	11/12/20 12:00 PM	50 Minutes	This session will dive deep on exciting new enhancements to law firm profiles including custom fields and firm dashboards, which you can use to analyze law firm performance and better manage relationships with your law firms.		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A
LT540 - International Invoicing, Part 1	11/12/20 12:00 PM	50 Minutes	Overview how to administer a global database, then dive deep on specific considerations including like number of databases, system roles, using core configurations globally, vendor IDs and language packs.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT640 - Achieving Real Savings	11/12/20 12:00 PM	50 Minutes	How to use legal spend data to develop and implement strategies that achieve savings, including experiences from other legal departments showing how they have maintained or increased service levels while significantly reducing outside		No pre-requisites	Any User	Advanced	0	Legal Tracker	N/A
LT130 - Dashboard Overview	11/12/20 1:00 PM	50 Minutes	This session will overview options for different types of dashboards, various configurations available, and exciting new persona-based dashboards designed for key members of your legal department.		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A
LT550 - International Invoicing, Part 2	11/12/20 1:00 PM	50 Minutes	Building on International Invoicing, Part 1, this session will dive deep into international invoicing considerations including invoice formats, tax compliance and proforma workflows.		No pre-requisites	Any User	Advanced	0	Legal Tracker	N/A
LT650 - The Ins and Outs of APIs	11/12/20 1:00 PM	50 Minutes	Tour the developer portal, connection information and successful use cases from other clients leveraging Tracker's APIs.		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A
LT220 - Task Code Alerts Deep Dive	11/12/20 2:00 PM	50 Minutes	This session will dive deep on how to use Task Code Alerts, including how to use TCAs for a phased budgeting approach and other strategies for using task codes to maximize savings, better manage spend and improve insights into legal		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT560 - Matter Intake	11/12/20 2:00 PM	50 Minutes	Come learn how to streamline the intake of matter details from internal partners and outside counsel, automating matter intake. This session will highlight how Tracker integrated matter intake from HighQ can reduce errors and improve		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT660 - How to Evolve Tracker When Your Org Changes	11/12/20 2:00 PM	50 Minutes	When your business changes, your Tracker configurations may no longer collect the data you need or report that data the way you need to see it. This session will provide recommendations on how to make changes and get the data you		No pre-requisites	Any User	Advanced	0	Legal Tracker	N/A
LT210R1 - Reporting, Part 2 (Repeat)	11/13/20 10:00 AM	50 Minutes	Building on Reporting, Part 1, we will dive deep into building key reports many legal departments use frequently, including: timekeeper rates, custom pending invoices and invoice review, and pre-configured/custom trending reports.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT570 - Managing a Large IP Portfolio	11/13/20 10:00 AM	50 Minutes	This session will explore specifics including matter administration and the invoicing process as they relate to intellectual property, including tips associated with billing requirements and also how to integrate your third party intellectual		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT650R1 - The Ins and Outs of APIs (Repeat)	11/13/20 10:00 AM	50 Minutes	Tour the developer portal, connection information and successful use cases from other clients leveraging Tracker's APIs.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT310 - Advanced Accruals Reporting	11/13/20 12:00 PM	50 Minutes	Go beyond the classic Unbilled Amounts and Accruals Reports with recent changes in Tracker that allow accrual fields to be accessed in Report Builder. This session will provide hands-on demonstration of fields to use to create your		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT510R1 - Optimizing Timekeeper Rate Review, Part 1 (Repeat)	11/13/20 12:00 PM	50 Minutes	This comprehensive sessions will provide a high-level overview of TKRR, including setting up configurations, communication with firms and rate upload options. We will also discuss roll-out plans like reports to run and data clean up.		No pre-requisites	Any User	Intermediate	0	Legal Tracker	N/A
LT680 - The New Role General Counsel and Chief Legal Officers Must Play	11/13/20 12:00 PM	50 Minutes	The role of General Counsel and Chief Legal Officers looks very different these days than even just 10 years ago—having gone from a position of largely exclusively providing legal expertise to now playing a key role in business		No pre-requisites	End User	Basic	0	Legal Tracker	N/A
LT320 - Smart Matter Create with Conditional Logic	11/13/20 1:00 PM	50 Minutes	This session will help you find patterns in data field choices and show you how to make matter creation easier through the implementation of Conditional Logic.		No pre-requisites	Any User	Basic	0	Legal Tracker	N/A
LT520R1 - Optimizing Timekeeper Rate Review, Part 2 (Repeat)	11/13/20 1:00 PM	50 Minutes	This session will feature a panel of Tracker clients discussing how they are using timekeeper rate data to drive cost savings within their legal department.		No pre-requisites	Any User	Panel	0	Legal Tracker	N/A
LT630 - Diversity and Inclusion - Micro or Macro?	11/13/20 1:00 PM	50 Minutes	Overview the data collection and reporting options for diversity tracking, including recent enhancements to timekeeper attributes and discuss how to roll these features out to your legal department and law firms.		No pre-requisites	Any User	Advanced	0	Legal Tracker	N/A