



2024 Education Course List

for Corptax



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Product Training Information

Product Training Information

CSC offers a wide selection of courses for both the new and advanced users, most of which are eligible for CPE credit. Sessions are taught by experienced trainers and designed to help address real-life issues through case studies and hands-on exercises.

We offer many convenient learning options to help address your learning needs on your terms:

- **Webcasts.** View free live webcasts or our library of on-demand webcasts over hot topics. The webcasts are designed to help you learn and work more efficiently.
- **Online Training.** Online instructor-led sessions provide detailed learning on specific subjects without having to leave your office.
- **Self-Study.** Online product training courses that are available on demand from our recording library, including interactive videos. Once you register, you will have access to the recording and the corresponding session documents for 30 days.
- **Classroom Training.** Immerse yourself in instructor-led sessions. Sessions are limited to a small number of participants to allow for individual instruction and knowledge-sharing. Visit our primary locations in the Chicago area and Dallas/Fort Worth area.
- **Onsite Training.** Experienced members of our training team will travel to your office and deliver a comprehensive training agenda designed to your specifications. Complete the [onsite request form](#) for more information.
- **Conference.** Attend CONNECT for networking and learning about all things Corptax.

Training Locations

Chicago Area

2100 E. Lake Cook Road
Suite 800
Buffalo Grove, IL 60089
847.236.8000


Dallas/Fort Worth (DFW) Area

4400 State Highway 121
Suite 500
Lewisville, TX 75056
972.677.4200

All online courses and classroom sessions in the Dallas/Fort Worth and Chicago areas are listed in Central Time (CT).

Continuous Education Subscription

One low price for a Continuous Education Subscription (CES) entitles you and your entire team to take advantage of continuous learning! The CES provides access to many online and classroom training sessions* for all licensed users at your company.

Note: Courses in this schedule that are included with the Continuous Education Subscription include the following indicator: 

Each session outlines learning objectives to improve your product usage and efficiency. With more than 100 sessions to choose from, you will find the right course for your business needs. Online sessions include self-study and live-instructor options. Classroom sessions offer hands-on learning and take place in our Chicago or Dallas/Fort Worth location. Access is easy—just log in to [CSC Connections](#) and select the session of your choice from the **Learn** area. The subscription pricing activates when you log in. Your subscription term mirrors your product renewal cycle, streamlining the approval process.

Contact your Account Manager or CRM today and get all the details on this great opportunity for your company.

CPE Information

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits will be granted based on a 50-minute hour. CPE is available for most live training sessions, but please check the training details in the Education Schedule for the official amount of CPE credits for each session.

Corptax, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

NASBA National Registry of CPE Sponsors – Sponsor License Number 108611

Texas State Board of Public Accountancy – Sponsor Number 009498

In accordance with the National Association of State Boards of Accountancy (NASBA) standards, course evaluations will be distributed at the end of the event.

Registration Information

Registration Information

A full listing of course offerings is available by visiting [CSC Connections](#). Please review the training details, including descriptions, price, and available CPE credits for a course by browsing from the list of upcoming sessions or typing in the name of the course in the **Search** field.

To register, you must complete the online registration form including the payment processing:

1. Log in to [Connections](#).
2. Click **Learn, Learn Home**.
3. Explore training opportunities by course type or product.
4. Locate the desired course and click **Register**.
5. Select **Complete Registration Now** or **Add to Cart and Complete Registration Later** to continue shopping and checkout via the cart when ready. **Note:** Your spot in a class is not reserved until you complete the checkout process.
6. Verify the class and price.
 - If you have a discount code, enter it into the **Discount Code** field and click **Apply Discount**.
 - If you have a training subscription, the price reflects what is included in your subscription.
7. Enter your payment information and click **Place My Order**.
8. Click **Printable Receipt** on the Registration Complete page to print your receipt. You can also access course information and handouts from this page.
9. Click **View Product** to access course information and handouts from this page.
10. Click **My Learning** to access your registered courses.

Cancellation Policy

- Cancellations up to three days prior to a scheduled classroom session will result in a withdrawal fee per registrant.
- Cancellations up to three days prior to a scheduled online session will result in a withdrawal fee per registrant.
- Cancellations within three days of any session and no-shows will be charged the full session fee.

We reserve the right to change the session fee and modify, reschedule, or cancel sessions at any time prior to the session start time. If we cancel a classroom session for which you are registered, you will receive a cancellation email three weeks prior to the session. If we cancel an online session for which you are registered, you will receive a cancellation email one week prior to the session.

To cancel your session for either a Classroom or Online session:

1. Log in to [Connections](#).
2. Create a case and select **Training** as the Product. Include the session date and title in the case details.

Additional Information

Please contact us at education@corptax.com for more information regarding course content, pricing, delivery methods, or CPE; to inquire about our refund and cancellation policy; or if you have any other questions.

Registration Information

Alphabetical Listing of Courses


Use this list to locate courses based on their name or type. To view full course details, log into [Connections](#) and select **Learn, Education Schedule**.


Types

 Online Training Course

 Self-Study Course (No CPE)

 Continuous Education Subscription Eligible

 Classroom Training Course

 Self-Study Course (CPE)

Course	Types				
	O	C	S	S+	CES
Administration and Security in Corptax Web—Setup	●				●
Automating Your Processes Using Corptax BOTS	●		●		●
Corpsales—Advanced		●			●
Corpsales—Basic		●			●
Corpsales Process Training	●				●
Corptax Administration—Enhance Your Troubleshooting Skills	●				●
Corptax Administration and Security—The Maintenance Life Cycle	●				●
Corptax Basic Insurance Series	●				●
Corptax Calendar	●				●
Corptax Database Connections	●				●
Corptax e-File for Foreign Bank Account Report (FBAR)	●		●		●
Corptax e-File Processing			●		●
Corptax Groups and Post Amounts Simplified	●				●
Corptax International Compliance: Form 5471 Basic Series			●		●
Corptax International Compliance - Preparing Form 1118 Workshop Series	●		●		●
Corptax International Compliance – Review of GILTI and FDII Form Data Workshop Series	●		●		●
Corptax International Foreign and Domestic Processing for the Intermediate User	●				●
Corptax Partnership—Advanced Series	●				●
Corptax Partnership e-Filing	●				●
Corptax Provision Federal Series			●		●
Corptax Provision Workshop Series for Intermediate Users	●				●
Corptax Setup for the Corporate Alternative Minimum Tax (CAMT)	●				●
Corptax Tax Contingency	●				●
Corptax U.S. Compliance—Basic Federal and State		●			●
Corptax U.S. Compliance—Basic State Series	●			●	●
Corptax U.S. Compliance Federal Considerations			●		●
Corptax U.S. Compliance: Filing Federal Amended Returns	●		●		●
Corptax U.S. Compliance: Filing State Amended Returns	●		●		●
Corptax U.S. Compliance - Intermediate Federal Topics	●				●
Corptax U.S. Compliance: Intermediate State Topics	●				●

Registration Information

Course	Types				
	O	C	S	S+	CES
Corptax U.S. Virtual Account – Net Income Per Books (Demo)			●		●
Corptax Web Reporting	●				●
Data Management Using Corptax Query Tools	●				●
Discover Corptax Data Collect Possibilities	●				●
Electronically Filing Form 7004 in Corptax	●				●
Ethics - Aesop's Code of Due Care	●				●
Ethics - Aesop's Code of Integrity	●				●
Federal e-Filing Using Corptax	●		●		●
Hands-on Federal e-Filing Using Corptax		●			●
How to Master Corptax Amount Import	●		●		●
International Compliance Processing Using Corptax		●			●
International Compliance Using Corptax – Maintaining Your Profiles for the Experienced User	●				●
International Compliance Using Corptax Next Gen or Legacy Methods to File Form 5471 Workshop Series	●				●
Introduction to Corptax			●		●
Introduction to Corptax Office	●		●		●
Introduction to Corptax Provision for New Users	●		●		●
Jumpstart your GMT Planning with Corptax Global Minimum Tax	●				●
Managing Documents with Corptax DocManager			●		●
Managing Entity Data Using Corptax Entity Properties and Views	●				●
Managing Entity Structures Using Corptax Ownership and Query Groups	●		●		●
Maximize Corptax Provision Capabilities	●				●
Mixed Returns Using Corptax	●				●
Next Level Automation with Corptax Office	●		●		●
Next Level Corptax Data Import	●				●
Preparing and Reviewing Corpsales Returns	●				●
Preparing Form 8865 Using Corptax International and Partnership Series	●				●
Preparing K-2 and K-3 in Corptax	●		●		●
Preparing Provision in Corptax		●			●
Reporting for Disregarded Entities Using Corptax Automated Form 8858	●				●
See the Big Picture with Corptax Visual Org	●				●
Setting Up Automated Adjustments Using Corptax Web Workshop Series	●				●
State e-Filing Using Corptax	●		●		●
Understanding Corpsales Process and Profiles	●				●
Understanding Corptax Fundamentals for International Compliance Workshop Series	●			●	●
U.S. CAMT Reports and Form 4626 Preparation	●				●
U.S. Compliance Using Corptax—Basic Federal Series	●			●	●

Registration Information

Course	Types				
	O	C	S	S+	CES
Using Corpsales Amount Import and Query Tools	●				●
Using Corptax Automated Adjustments to Enhance Your Processes	●				●
Using Corptax for Your Base Erosion and Profit Shifting Reporting (BEPS)	●				●
Using Corptax International Next Gen Method to File Form 5471 Series	●				●
Using Corptax International Reports for Your Domestic Process	●				●
Using Corptax International Reports for Your Foreign Process	●				●
Using Corptax Office with Your International Data	●				●
Using Corptax Office with Your Provision Data	●		●		●
Using Corptax to Setup Workflow	●				●
Using Corptax U.S. State Planner	●		●		●