



Tax & Accounting

2018 Tax Software Update Webinars



Please accept this invitation to register and attend one of our 2018 Tax Software Update Webinars, available via a convenient web-based session, or an On-Demand eLearning course via our Learning Management System. Here, you will learn all about the newest enhancements and how to maximize them, resulting in productivity like you've never before experienced.

Webinars start in early January and are available through February 8, 2018. Don't get left behind by not attending. Stay one step ahead by preparing for tax season now.

Why Attend a Tax Software Update Webinar?

All experienced CCH® ProSystem fx® Tax, CCH® Global fx and CCH Axxess™ Tax users will benefit from learning about the latest enhancements made to the program. Numerous improvements and changes will be covered in detail, providing valuable information to all users, from your junior staff to your most seasoned veteran.

Please note: The Tax Software Update Webinars are conducted exclusively using the Worksheet View interface. An On-Demand eLearning course on using the Interview Forms will be available. See the On-Demand eLearning listing in this brochure.

Here are just a few of the many enhancements covered in the Tax Software Update Webinars:

- Legislation changes resulting from:
 - Protecting Americans from Tax Hikes Act (PATH) 2015
 - Surface Transportation and Veterans Health Care Choice Improvement Act of 2015
 - Security Summit Partnership (Electronic Filing)
- Additional federal forms and state returns for electronic filing
- New features in the Electronic Filing Status System and Tax Preparation

Who Should Attend a Tax Software Update Webinar?

We strongly recommend the following CCH ProSystem fx Tax, CCH Global fx and CCH Axxess Tax users attend:

- Staff
- Partners
- Managers
- Administrators

Important note: Tax Software Update Webinars are intended for experienced CCH ProSystem fx Tax, CCH Global fx and CCH Axxess Tax users.

The Bottom Line

Our Tax Software Update Webinars and On-Demand eLearning course are designed to keep your staff up to date on program changes due to new tax laws and general program enhancements, including new features and functionality. Translate our enhancements into your increased productivity!

Earn Valuable CPE Credit

Tax Software Update Webinars offer a great value for your investment. All training materials are included in the cost of the webinar and attendees will earn valuable CPE credit hours.



2018 Tax Software Update Webinar and eLearning Content

The following is a preview of some of the exciting enhancements we'll cover.

General

- Changes impacted by Security Summit Partners
- Drill Down capability for selected lines
- Worksheet View Menu changes
- Office Manager/Return Configuration Set options
- Return Due Date changes

Individual Returns

- Drill Down capability for selected lines
- Form 8903 — Added pro forma carryovers
- Form 1099-MISC — Non-employee Compensation carries to Form 1040, line 21

Fiduciary Returns

- Drill Down capability for selected lines
- First Extensions — Ability to produce for all taxing authorities with a single option
- Added diagnostics when return disqualifies due to address, city, state or ZIP code
- Publicly Traded Partnership aggregation capability added

Partnership Returns

- First Extensions — Ability to produce for all taxing authorities with a single option
- Form 8975, Country-by-Country Report and Schedule A, Tax Jurisdiction and Constituent Entity Information

Corporation Returns

- Form 8975, Country-by-Country Report and Schedule A, Tax Jurisdiction and Constituent Entity Information
- Drill Down capability for selected lines
- First Extensions — Ability to produce for all taxing authorities with a single option
- Schedule M-3 statements added to consolidated returns

Electronic Filing

- Changes impacted by Security Summit Partners — Vendor Control Number requirement using EFIN Manager
- Agreements with States for paper and electronic filing submissions
- Return version added to history
- Filter/Search panel redesign



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

Webinars

Our convenient 2018 Tax Software Update Webinars allow you to attend from your home, office or anywhere you have internet access.

The Tax Software Update Webinars are offered on dates and times that fit your schedule. The two-hour format covers all Tax Update material and qualifies for 2 hours of valuable CPE credit.

The number of customers taking advantage of the webinars continues to grow and is largely attributed to the ease, comfort and cost-effectiveness of training on the day and time of your choice. Led by experienced Wolters Kluwer instructors, the webinars are conducted live over the internet, allowing you to actively participate by asking questions during the session. The webinars require no special setup. All you need is an internet connection and a telephone to take advantage of this convenient solution for staying up to date.

For more information on Tax Software Update Webinars, please visit our website at CCHGroup.com/TaxWebinar or call **800-739-9998, option 2, option 2**, followed by **option 1**.

Registered attendees of all webinars are eligible for CPE credits. Start and end times vary; please refer to the following schedule for specifics. Registered attendees will receive a confirmation email at the time their registration is processed. Webinar access information and instructions on downloading webinar materials will be sent at least three days prior to the training date.

Individual, Fiduciary and Business Returns Webinars

\$150 per attendee/2 CPE credits

All webinar times are Eastern Standard Time.

CCH Access™ Tax Users

Date	Time
Monday, Jan. 8	3–5 p.m.
Friday, Jan. 19	10 a.m.–Noon
Wednesday, Jan. 24	3–5 p.m.
Monday, Jan. 29	10 a.m.–Noon
Tuesday, Feb. 6	3–5 p.m.

CCH® ProSystem fx® Tax Users

Date	Time
Thursday, Jan. 4	3–5 p.m.
Friday, Jan. 5	3–5 p.m.
Tuesday, Jan. 9	10 a.m.–Noon
Friday, Jan. 12	3–5 p.m.
Monday, Jan. 15	10 a.m.–Noon
Wednesday, Jan. 17	3–5 p.m.
Tuesday, Jan. 23	3–5 p.m.
Thursday, Jan. 25	3–5 p.m.
Friday, Feb. 2	10 a.m.–Noon
Thursday, Feb. 8	3–5 p.m.

Please note: The Tax Software Update Webinars are conducted exclusively using the Worksheet View interface.

Easy Ways to Register

 Visit CCHGroup.com/TaxWebinar

 Call us at **800-739-9998, option 2, option 2**, then **option 1**

For more information regarding administrative policies, such as complaint resolution and refunds, please contact Customer Training at 800-739-9998.

eLearning

An exciting Tax Update eLearning course will be offered via our Learning Management System beginning January 2018:

- 2018 Tax Software Update — Interview Forms

Our new interactive 2018 Tax Software Update eLearning training course offers several advantages for you and your staff:

- It's **self-paced** and designed to allow the learner to go through smaller chunks of training that can be used and absorbed for a while before moving on.
- Our eLearning course can be taken when needed — they are available 24/7.
- Our interactive eLearning activities enhance learner engagement and improve retention.

The course, which is priced at \$75 per learner, qualifies for 1 hour of CPE credit:

- **2018 Tax Software Update — Interview Forms — eLearning** — This one-hour course will be beneficial if you are using CCH ProSystem fx Tax and prefer navigating the system using the Interview Forms. This session will benefit customers using this method of preparation, as the annual Tax Software Update live webinar does not include any discussion on Interview Forms.

Overall this course will cover the latest enhancements to the software so that you can improve your efficiency during tax season.

Visit CCHGroup.com/TaxWebinar or call 800-739-9998, option 2 for more information.

Also Available:

Wolters Kluwer Software New User Training

Does your staff need introductory training on CCH ProSystem fx Tax, CCH Global fx or CCH Access Tax? Register today for the following new user courses:

- Introduction to Tax
- Introduction to Individual Returns
- Introduction to Corporation Returns
- Introduction to Partnership Returns



For the most up-to-date schedule of all classes available, visit CCHGroup.com/TaxCourses, and scroll down and expand the Professional and Client Services — Training and Consulting section.

Go to CCHGroup.com/Training-and-Support/eLearning for more information about our eLearning opportunities.

Contact information:

Wolters Kluwer
2700 Lake Cook Road
Riverwoods, IL 60015
United States
800-739-9998

Please visit CCHGroup.com/TaxWebinar
for more information.

