

2010 Premium Pro Regional Training Agenda

Continental Breakfast (7:30am – 8:00am)

Session 1 (8:00am – 9:00am)

Overview

- Interface
- Navigation
- Toolbars
- Dockable Frames
- Admin Tool
- Roles/Permissions
- Assignments

Session 2 (9:00am – 10:00am)

Company Information

- General Information
- Annual Statement Schedules
- Fee & Rate Schedules
- Data Entry
- Rollover
- Import Functionality

Break (10:00am – 10:15am)

Session 3 (10:15am – 11:30am)

Filing & Retaliatory Returns

- Reviewing and Adjusting Returns
- Company and Jurisdiction Options
- Form status
- Field Colors
- Calculation Process
- Retaliatory Calculations

Supporting Features

- Preparer Notes
- Attachments
- Return Instructions
- State Filing Information

Session 4 (11:30am – 12:00pm)

Management Reports

- Summary Schedules
- Check Request Export
- Override Report
- Audit Report

Lunch (12:00pm – 1:00pm)

Session 5 (1:00pm- 1:30pm)

Estimated Taxes & Print

- Input Schedule
- Estimate Returns
- Summary of Taxes
- Print Icon
- Print to PDF
- Print Menu

Session 6 (1:30pm- 2:00pm)

Electronic Filing

- Mandatory Online Filing
- Filing via TriTech
- Filing via OPTins
- Web Efile Assistant

Session 7 (2:00pm-2:30pm)

GFA Tracking System

- Input Schedules
- Import
- Summary
- Check Requests

Session 8 (2:30pm – 3:00pm)

FormsPlus

- Company Information
- Data Entry
- Reviewing and Adjusting Forms
- Form Status
- Summary Schedules
- Reports
- Print

Break (3:00pm – 3:15pm)

Session 9 (3:15pm –3:45pm)

Allocator

- Processing Premiums
- Allocation Reports
- Filters
- Custom Reports
- Municipal Boundary Map
- Appending Files
- Export

Session 10 (3:45pm – 4:30pm)

Municipal

- Company Information
- Address, Rate, and Fee Schedules
- Input Schedules
- Data Entry
- Import
- Reviewing and Adjusting Returns
- Check Requests
- Summary Reports
- Print
- Options
- Digitized Signature

Session 11 (4:30pm – 5:00pm)

Calendar

- Integration & Migration
- Calendar View
- Queries