

## CORPTAX<sup>®</sup> WorkSpace

### Compliance Management Process and Content Package

#### Business Advantages of CORPTAX WorkSpace Compliance Management

The WorkSpace Compliance Management Process and Content Package provides a **common platform to manage, track and report on the status of all compliance deliverables in one place**. This package also helps your organization easily integrate CORPTAX WorkSpace and CORPTAX compliance products, creating a single source solution for corporate tax compliance.

With this package, tax professionals will be able to:

- Track, report, and review the status of deliverables for federal, state, and international compliance processes and e-file
- Manage your company's compliance deliverables, while complying with complex laws and regulations
- Review and manage forms, reports, elections, disclosures and statements that are required for your filings
- Ensure payments are processed according to policy and submitted timely
- Easily create reports by filtering, sorting and grouping on any of the attributes
- Collaborate in a secure environment with centralized storage

#### Compliance Management Setup

Our Professional Services WorkSpace experts work closely with you to educate your team on the functionality of the Compliance Process and Content Package. We conduct working sessions with your team members to gather information, define functional requirements, and design updates to the standard compliance management process, resulting in a personalized compliance management solution. This saves you valuable time while having a minimal impact on your internal resources.

Next, we design, configure, test and document the following high-level deliverables:

- Setup deliverable tracker to manage the assignment, review, approval, and completion of all deliverables, including internal and external due dates
- Configure standard workflows and task processes assignments in the context of the compliance process
- Provide the ability to track, manage and report on all filing components, including consolidations and combined, separate and unitary filings

## Compliance Management Setup (cont'd)

- Provide a cross-functional collaboration area that uses pre-defined tax attributes
- Identify management reporting requirements
- Provide the ability to track the testing and validation statuses required for e-file transmissions
- Identify the site owners, administrators and users
- Define the security and permission levels for each user and group
- Provide the ability to review and configure tax attributes required for the various compliance processes
- Provide the framework that includes the tools, functionality and data necessary to develop related reports, dashboards or key performance indicators
- Identify required tax attributes to standardize and provide consistency throughout your compliance processes

## Training

Training sessions incorporate a 'train-the-trainer' approach, which prepares the individual to train others in the tax department. Once completed, additional training will be provided on a time and material basis.

## Support

Upon completion of the deliverables and training, ongoing support is provided through CORPTAX Online Support and the Customer Support Center (877-426-7782).

**Get Started with CORPTAX® WorkSpace Compliance Management Today!**

Contact CORPTAX at 800-966-1639  
or visit our website at [www.corptax.com](http://www.corptax.com).

# Compliance Management

