

## CORPTAX<sup>®</sup> WorkSpace

### Research Credit Management Process and Content Package

#### Business Advantages of CORPTAX WorkSpace Research Credit Management

The WorkSpace Research Credit Management Process and Content Package provides a **common platform to manage and track all documents and deliverables required to support the research credit calculation**. The tracking and management of supporting documentation and tasks for readiness of the research credit examination becomes systematic.

In addition to collaboration among the various resources and the ability to track the status of deliverables, report on that status, and review the results, tax professionals will be able to:

- Manage your company's supporting documentation
- Easily create reports by filtering, sorting, and grouping on any of the attributes
- Provide a web-based survey form to compile information regarding your company's projects to support the research credit
- Collaborate in a secure environment with centralized storage
- Provide key performance indicators for tracking the status of tasks associated with your research credit management

The WorkSpace Research Credit Management Process and Content Package ensures you get the most out of WorkSpace and expedite the implementation, saving you valuable time while having a minimal impact on your internal resources.

#### Research Credit Management Setup

Our Professional Services WorkSpace experts work closely with you to demonstrate and educate your team on the process and content available via the Research Credit Management Process and Content Package. We conduct working sessions with your team members to gather information, define functional requirements, and design updates to the standard research credit management process, resulting in a personalized research credit management solution.

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
- Review the survey and configure to your company's specifications
- Configure standard workflows and task processes assignments in the context of the research credit process
- Identify management reporting requirements

## Research Credit Management Setup (cont'd)

- 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 research credit management 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 research credit 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 Research Credit Management Today!**

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



# Research Credit Management