



Year-end Nonresident Alien Tax Training – Software Sessions December 9 - 10, 2010

Thursday, December 9, 2010

7:30 - 8:30	Registration and Continental Breakfast provided by Windstar
8:30 – 9:15	Windstar Solutions
Presenter	Connie Medico and Manny Paola
	<ul style="list-style-type: none"> • Windstar® Support <ul style="list-style-type: none"> ○ On-line Training ○ Windstar User's Guide ○ Windstar Quick Starts ○ Windstar Users' Website ○ Windstarusers listserv ○ Problem Resolution – FTP ○ Email Support • Windstar® Solutions <ul style="list-style-type: none"> ○ <i>International Tax Navigator</i>® ○ FNIS-Web-based Data Collection/Forms Delivery ○ Security Administrator ○ Utilities-Archiving, Databases, Exporting ○ New Hires ○ 1042-S Annual Processor ○ Batch Processor ○ Treaty Navigator ○ Interfaces
9:15 - 10:00	Changes in the <i>International Tax Navigator</i>
Presenter	Gary Singer
	<ul style="list-style-type: none"> ○ Overview of the changes in the 2011 Tax Navigator software
10:00 – 10:20	Break provided by Windstar

Concurrent Sessions		
	Tax Navigator Basics Track	Special Topics Track
10:20 – 12:00	Tax Navigator Boot Camp	Tax Navigator Reports and Interfaces
Presenter	Connie Medico and Manny Paola	Scott Annis
	<ul style="list-style-type: none"> • Quick overview of entire Tax Navigator System before going into specific functions • Adding an Individual's Record • Using Your Sample Database • Changing an Individual's Data • Deleting an Individual's Record or Data • Navigating Through the Basic Screens • Understanding Reports 	<ul style="list-style-type: none"> • Tax Navigator Reporting Capabilities • Mail Merge • System Flow • Demographic Data Sources and Interfaces • Immigration Data Sources and Interfaces • Payment Data Sources and Interfaces • Telling the Paying System "What To Do" • Windstar's ERP Alliances and Interfaces
12:00 – 1:00	Lunch provided by Windstar	
1:00 – 1:45	Tax Navigator Boot Camp (Cont.)	Web-Based Data Collection and Forms Delivery (FNIS) – Part 1
Presenter	Connie Medico and Manny Paola	Tom Penhale
	<ul style="list-style-type: none"> • How to Enter and Change Immigration Information • Immigration Status and "Primary Purpose" • Performing the Substantial Presence Test • Understanding the Logs • Where Did My Forms Go? • Entering Income Information • Types of Income <ul style="list-style-type: none"> ○ Scholarships ○ Employment Compensation • The Treaty Analysis and Reports • Reading the Logs 	<ul style="list-style-type: none"> • Overview • Administration settings • Creating foreign national records • Foreign national entering data on website
1:45 – 2:30	How Options and Settings Affect Results	Web-Based Data Collection and Forms Delivery (FNIS) – Part 2
Presenter	Terri Crowl and Scott Annis	Tom Penhale
	<ul style="list-style-type: none"> • Setting Up Your Organization • Setting Your Defaults <ul style="list-style-type: none"> ○ SPT ○ Treaty ○ Forms • Sending Data to Windstar 	<ul style="list-style-type: none"> • Administrator Approval Process Interfaces export to Tax Navigator • Uploading forms from Tax Navigator • Advanced features
2:30 – 2:50	Break provided by Windstar	

Thursday, December 9, 2010 (Continued)

2:50 – 4:00	Performing SPT, Treaty Analysis, and Understanding Logs
Presenter	Scott Annis and Jason Foley
	<ul style="list-style-type: none">• Entering and Changing Immigration Information• Dealing With Holiday and Vacation Days Away• Performing the Substantial Presence Test• Redoing SPT• Electing Residency Status• Dealing With Changes in Immigration Status• Residency Start and End Dates• Residency Analysis Options• Reading the Status Reports• Entering Income Data• What To Do When There Are No U.S. Days• Performing the Treaty Analysis• Dealing With Out of System Payments• Reading the Treaty Analysis Log• Redoing the Analysis• TIN Issues• Required Forms (8233, W-8BEN, W-9)
4:00 – 4:15	Break provided by Windstar
4:15 – 5:00	Tax Navigator Processing Case Studies
Presenter	Connie Medico, Manny Paola, and Terri Crowl
	<ul style="list-style-type: none">• Case Study Example of Entering the Following Payments into Tax Navigator<ul style="list-style-type: none">○ Royalty Payment to a Corporation○ 9/5/6 Honorarium Payment to a B-1○ J-1 Researcher

Friday, December 10, 2010

7:30 - 8:30	Continental Breakfast provided by Windstar	
	Concurrent Sessions	
	1042-S Track	Hands-on Q&A Track
8:30 – 9:15	Strategy for 1042-S and 1042 Submission and Using the IRS FIRE System	Hands-on Q&A
Presenter	Scott Annis	
	<ul style="list-style-type: none"> • Getting your organization ready for Year-End Processing • What is new at IRS/MCC? • The Fatal Errors that will delay processing your returns • Dealing with IRS Edits • IRS Publications and Forms • Requesting an Extension – 1042, 1042S • Submitting Forms 	<ul style="list-style-type: none"> • Meet one-on-one with Windstar experts for personalized Tax Navigator instruction
9:15 – 10:00	Preparing 1042-S and 1042 Forms	Hands-on Q&A
Presenter	Scott Annis	
	<ul style="list-style-type: none"> • Maintaining the Record • Adding Withholding Allowances • Preparing Submission for the IRS and Individuals • Original Submission 	<ul style="list-style-type: none"> • Meet one-on-one with Windstar experts for personalized Tax
10:00 – 10:20	Break provided by Windstar	
10:20 – 12:00	Preparing 1042-S and 1042 Forms (Cont.)	Hands-on Q&A
Presenter	Scott Annis and Gary Singer	
	<ul style="list-style-type: none"> • Printing Issues • Mailing Issues • Processing 1042-S Forms • Completing a Form 1042 • Using the IRS FIRE System • Getting the TCC Number 	<ul style="list-style-type: none"> • Meet one-on-one with Windstar experts for personalized Tax Navigator instruction
12:00 – 1:00	Lunch provided by Windstar	

Friday, December 10, 2010 (Continued)

1:00 – 2:00	Amending Records and Making Changes to Submitted Files	Hands-on Q&A
Presenter	Gary Singer	
	<ul style="list-style-type: none">• Dealing with 1042-S Errors• How to Void and Correct an Individual Record• When is a Correction Not a Correction• Submissions With Corrected and Voided Records	<ul style="list-style-type: none">• Meet one-on-one with Windstar experts for personalized Tax Navigator instruction
2:00 – 3:00	Batch Processing	Hands-on Q&A
Presenter	Scott Annis	
	<ul style="list-style-type: none">• Substantial Presence Test (SPT) in Batch• Treaty Analysis in Batch• Reports on Changes• Creating Form 8843• Special Batches• Interface Batches	<ul style="list-style-type: none">• Meet one-on-one with Windstar experts for personalized Tax Navigator instruction
End of Program		

***Schedule subject to change.**