

Tax Track

MONDAY

11:15 AM – 12:00 PM

CMI Annual Release Review

This session will review the latest release of CMI Tax software. A CMI Tax Support Representative will be on hand to discuss the latest changes, expected release dates, and to answer questions about future enhancements.

1:00 PM – 2:00 PM

Release Review (continued) and 3rd Party Uploads

This session will finish the review of the latest release to the Tax software. A CMI Support Representative will then demonstrate how to upload electronic payments through the CMI software to post automatically to the accounts.

2:00 PM – 3:00 PM

System Setup and Maintenance

This session will cover the nuts and bolts to the administrative section of the software. A CMI Representative will lead the discussion and demonstrate the different facets from the administrative prospective.

3:15 PM – 4:30 PM

Account Transactions and Deposits

A CMI Tax Support Specialist will be on hand to discuss account transactions and deposits. This session is designed to show users the options that are available, and how you may be able to streamline your business processes.

TUESDAY

9:15 AM – 10:15 AM

Available CMI Modules

This session is for a demonstration of different products that CMI has available, and how they can benefit tax offices. This is not a sales pitch, but an opportunity to view what CMI has and talk to other tax administrators that are using the product and how it is being used.

10:30 AM – 12:00 PM

Round Table Q & A

This session is an open forum for tax offices to share information. It is a good opportunity to get to know other Tax users. This is a good place to bring questions or issues that any tax office is dealing with and get feedback and suggestions from peers.

1:00 PM – 2:15 PM

Email options and DocuScan

This session is being led by a CMI Representative and will demonstrate a new option that is coming out in the new release. The new programming will allow you to automatically attach a copy of an email to an account through DocuScan.