



**Spring Nonresident Alien Tax Training  
Software Track  
April 29 – 30, 2010**

**Thursday, April 29, 2010**

7:30 - 8:30	Registration and Continental Breakfast provided by Windstar
<b>8:30 – 9:15</b>	<b>Tax Law Regulations and Tax Navigator Processes</b>
<b>Presenter</b>	<b>Paula Singer</b>
	<ul style="list-style-type: none"> <li>• Overview of the Processing Capabilities of the International Tax Navigator® to Handle Nonresident Alien Taxation</li> </ul>
<b>9:15 - 10:00</b>	<b>Windstar Solutions – Tax Navigator Overview</b>
<b>Presenter</b>	<b>Connie Lizio and Manny Paola</b>
	<ul style="list-style-type: none"> <li>• Windstar® Support <ul style="list-style-type: none"> <li>○ On-line Training</li> <li>○ Windstar User's Guide</li> <li>○ Windstar Quick Starts</li> <li>○ Windstar Users' Website</li> <li>○ Windstarusers listserv</li> <li>○ Problem Resolution – FTP</li> <li>○ Email Support</li> </ul> </li> <li>• Windstar® Solutions <ul style="list-style-type: none"> <li>○ International Tax Navigator®</li> <li>○ FNIS-Web-based Data Collection/Forms Delivery</li> <li>○ Security Administrator</li> <li>○ Utilities-Archiving, Databases, Exporting</li> <li>○ New Hires</li> <li>○ 1042-S Annual Processor</li> <li>○ Batch Processor</li> <li>○ Treaty Navigator</li> <li>○ Interfaces</li> </ul> </li> </ul>
10:00 – 10:20	Break provided by Windstar

Concurrent Sessions		
	Tax Navigator Basics Track	Special Topics Track
<b>10: 20 – 12:00</b>	<b>Getting Started with Tax Navigator</b>	<b>Tax Navigator Reports and Interfaces</b>
<b>Presenter</b>	<b>Connie Lizio and Manny Paola</b>	<b>Scott Annis</b>
	<ul style="list-style-type: none"> <li>• Quick overview of entire Tax Navigator System before going into specific functions</li> <li>• Adding an Individual's Record</li> <li>• Using Your Sample Database</li> <li>• Changing an Individual's Data</li> <li>• Deleting an Individual's Record or Data</li> <li>• Navigating Through the Basic Screens</li> <li>• Understanding Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Tax Navigator Reporting Capabilities</li> <li>• Mail Merge</li> <li>• Building Lists</li> <li>• System Flow</li> <li>• Demographic Data Sources and Interfaces</li> <li>• Immigration Data Sources and Interfaces</li> <li>• Payment Data Sources and Interfaces</li> <li>• Telling the Paying System "What To Do"</li> <li>• Windstar's ERP Alliances and Interfaces</li> </ul>
12:00 – 1:00	Lunch provided by Windstar	
<b>1:00 – 2:00</b>	<b>Getting Started with Tax Navigator (Cont.)</b>	<b>Maintaining Your Tax Navigator Software and Staying Up-to-Date</b>
<b>Presenter</b>	<b>Connie Lizio and Manny Paola</b>	<b>Scott Annis and Terri Crowl</b>
	<ul style="list-style-type: none"> <li>• How to Enter and Change Immigration Information</li> <li>• Immigration Status and "Primary Purpose"</li> <li>• Performing the Substantial Presence Test</li> <li>• Understanding the Logs</li> <li>• Where Did My Forms Go?</li> <li>• Entering Income Information</li> <li>• Types of Income                             <ul style="list-style-type: none"> <li>○ Scholarships</li> <li>○ Employment Compensation</li> </ul> </li> <li>• The Treaty Analysis and Reports</li> <li>• Reading the Logs</li> </ul>	<ul style="list-style-type: none"> <li>• Upgrading Software</li> <li>• Common Error Messages</li> <li>• Security Key Issues</li> <li>• Multiple People in the System</li> <li>• Replacing Previous Users</li> <li>• Maintaining Organization Information</li> </ul>

**Thursday, April 29<sup>th</sup> (Continued)**

<b>2:00 – 2:30</b>	<b>How Options and Setting Affect Results</b>	<b>Web-Based Data Collection and Forms</b>
<b>Presenter</b>	<b>Terri Crowl</b>	<b>Tom Penhale</b>
	<ul style="list-style-type: none"> <li>• Setting Up Your Organization</li> <li>• Setting Your Defaults               <ul style="list-style-type: none"> <li>○ SPT</li> <li>○ Treaty</li> <li>○ Forms</li> </ul> </li> <li>• Sending Data to Windstar</li> </ul>	<ul style="list-style-type: none"> <li>• Use and Flow</li> <li>• Administrative Functions – Part 1</li> <li>• Foreign National Functions</li> </ul>
2:30 – 2:50	Break provided by Windstar	
<b>2:50 – 4:00</b>	<b>Determining Tax Residency and Year Income</b>	<b>Web-Based Data Collection and Forms Delivery (FNIS) – Part 2</b>
<b>Presenter</b>	<b>Jason Foley and Scott Annis</b>	<b>Tom Penhale</b>
	<ul style="list-style-type: none"> <li>• Entering and Changing Immigration Information</li> <li>• Dealing With Holiday and Vacation Days Away</li> <li>• Performing the Substantial Presence Test</li> <li>• Redoing SPT</li> <li>• Electing Residency Status</li> <li>• Dealing With Changes in Immigration Status</li> <li>• Residency Start and End Dates</li> <li>• Residency Analysis Options</li> <li>• Reading the Status Reports</li> <li>• Entering Income Data</li> <li>• What To Do When There Are No U.S. Days</li> <li>• Computing Withholding Allowances</li> <li>• Performing the Treaty Analysis</li> <li>• Dealing With Out of System Payments</li> <li>• Determining the “Primary Purpose” for the Visit               <ul style="list-style-type: none"> <li>○ Students</li> <li>○ J-1 Non-students</li> <li>○ H-1B Specialty Workers</li> </ul> </li> <li>• Reading the Treaty Analysis Log</li> <li>• Redoing the Analysis</li> <li>• TIN Issues</li> <li>• Required Forms (8233, W-8BEN, W-9)</li> </ul>	<ul style="list-style-type: none"> <li>• Administrative Functions – Part 2</li> <li>• Advanced Features               <ul style="list-style-type: none"> <li>○ Email Options</li> </ul> </li> <li>• Forms Delivery</li> </ul>
4:00 – 4:15	Break provided by Windstar	
<b>4:15 - 5:00</b>	<b>Tax Navigator Users Client Forum</b>	
<b>Presenter</b>	<b>Class Based Discussion (Specific topics will be based on registrant feedback)</b>	
	<ul style="list-style-type: none"> <li>• Class-based discussion focusing on client-identified issues, example topics include best practices, what does and does not work at your particular organization, barriers to effective processing of payments, and effective communication strategies</li> </ul>	

**Friday, April 30, 2010**

7:30 - 8:30	Continental Breakfast provided by Windstar	
8:30 – 9:00	<b>Batch Processing Year-end</b>	
<b>Presenter</b>	<b>Scott Annis</b>	
	<ul style="list-style-type: none"> <li>• Substantial Presence Test (SPT) in Batch</li> <li>• Treaty Analysis in Batch</li> <li>• Reports on Changes</li> <li>• Creating Form 8843</li> <li>• Special Batches</li> <li>• Interface Batches</li> </ul>	
<b>Concurrent Sessions</b>		
	<b>Hands-on Track</b>	<b>One-on-One Software Q&amp;A Track</b>
9:00 – 10:00	<b>Strategy for 1042-S and 1042 Submission</b>	<b>Tax Navigator One-on-One Q&amp;A</b>
<b>Presenter</b>	<b>Scott Annis</b>	<b>Connie Lizio and Manny Paola</b>
	<ul style="list-style-type: none"> <li>• Getting your institution ready for Year-End Processing</li> <li>• What is new at IRS/MCC?</li> <li>• The Fatal Errors that will delay processing your returns</li> <li>• Dealing with IRS Edits</li> <li>• IRS Publications and Forms</li> <li>• Requesting an Extension – 1042, 1042S</li> <li>• Submitting Forms</li> </ul>	<ul style="list-style-type: none"> <li>• Meet one-on-one with Windstar experts for personalized Tax Navigator instruction</li> </ul>
10:00 – 10:20	Break provided by Windstar	
10:20 – 12:00	<b>Amending Records and Making Changes to Submitted Files</b>	<b>Tax Navigator One-on-One Q&amp;A</b>
<b>Presenter</b>	<b>Gary Singer</b>	<b>Connie Lizio and Manny Paola</b>
	<ul style="list-style-type: none"> <li>• Dealing with 1042-S Errors</li> <li>• How to Void and Correct an Individual Record</li> <li>• When is a Correction Not a Correction</li> <li>• Submissions With Corrected and Voided Records</li> </ul>	<ul style="list-style-type: none"> <li>• Meet one-on-one with Windstar experts for personalized Tax Navigator instruction</li> </ul>
12:00 – 1:00	Lunch provided by Windstar	

**Friday, April 30<sup>th</sup> (Continued)**

<b>1:00 – 2:30</b>	<b>Considerations When Creating Policies and Procedures</b>	<b>Tax Navigator One-on-One Q&amp;A</b>
<b>Presenter</b>	<b>Terri Crowl</b>	<b>Connie Lizio and Manny Paola</b>
	<ul style="list-style-type: none"><li>• Ensuring You're Kept In The Loop</li><li>• Campus Liaisons/Who to Have In Your Corner and How to Get Them There</li><li>• Gathering Basic Information</li><li>• What Documentation to Collect for Common Payment Types</li><li>• Case studies</li></ul>	<ul style="list-style-type: none"><li>• Meet one-on-one with Windstar experts for personalized Tax Navigator instruction</li><li>• Learn about Windstar's newest products</li></ul>
<b>End of Program</b>		

**\*Schedule subject to change.**