



CaseWare Tax Forms Training Course Details

This course offers an introduction to CaseWare Tax Forms using hands on practical examples to enhance understanding.

Application features will be explained in detail, identifying how the CaseWare Tax Forms can be used to assist in the completion and management of client tax returns.

CaseWare Tax Forms is an application that offers a unique way to manage your clients' Tax Returns. The process of completing and submitting returns to the Inland Revenue Department is simplified by the use of a number of intuitive features. Tax return can be completed and validated in Greek or English. For tax returns that are required to be manually submitted, Special Ministry Finance approval has been obtained. Alternatively returns that are required to be submitted electronically can be completed in CaseWare Tax Forms and exported in batch to XML for submission via the TAXISnet system.

The seminar is aimed at both existing and potential new users

- For existing users the seminar provides training of how to use the template and at the same time a detailed understanding of the full potential of the template.
- For new users the seminar offers a detailed understanding of the template functionality and the benefits of using the template and can assist in the decision to proceed with adaptation of the template.



Course Outline

1. Tax Returns

- New taxpayer registration
- Modification of taxpayer details.
- Client Details Vs Tax Returns details
- Entering a New Tax Return (IR1E)
- Printing and Saving options
- Retrieve from prior years and copying across returns
- Revised returns and versioning
- IR7 – Importing IR7 Analysis, creating IR63
- XML file creation for electronic submission
- Tax Returns management options.

2. Other Forms and Utilities

- Completing other tax forms
- Letters
- Taxisnet applications
- Utilities

3. User Interface, Database structure and Tax Forms Updates

- Identifying version details and performing an update
- Switching language and the various menu options
- Central database structure

4. Integration with Financial Statements Template

- IR1SE – completing Parts 6C and 6D from financial statements
- IR4 – Transferring completed returns to Tax Forms for further tax management