

The Corptax Certified Professional: Pass Through Compliance Program is designed to certify your Corptax knowledge and skills for pass-through compliance. (*Certifications use the latest release of Corptax products.*) Our certification programs cover core product usage along with Corptax-recommended best practices. Areas covered in this certification program include:

- Federal and state partnership compliance
- Preparing Form 8825
- Electronic filing of partnership federal and state returns
- S Corporation compliance
- Partnership e-filing tips and troubleshooting

What's in it for me?

- **Stand out from the crowd** with certified Corptax skills for personal and professional growth.
- **Join an exclusive community** of Corptax Certified Professionals.
- **Be recognized** as a Corptax Certified Professional on corptax.com, and use the Corptax Certified logo on your business cards and email signatures.
- **Earn continuing professional education (CPE) credits** for classroom and online training sessions completed as part of the certification.

What do I have to do to be certified?

- Successfully complete a knowledge exam to certify skill in efficient product usage. To register, go to **Learn, Education Schedule** in [CSC Connections](#) and filter the category to *Certified Professional*. You may take the knowledge exam at any time. You must earn at least a 75% score to pass.
- Successfully complete a case study to certify practical application of the process. To register, go to **Learn, Education Schedule** in [CSC Connections](#) and filter the category to *Certified Professional*. Register to take the case study exam on an available date. You must earn at least a 75% score to pass.
- The certification fee is \$595 per certification topic. Fee includes unlimited attempts for the knowledge exam and two attempts at the case study. Subsequent attempts for the case study are available at \$50 each.
- You must pass both exams within 6 months of each other.

How do I maintain my certification?

The certification is valid for three years if you meet the following annual requirements:

- Complete 10 CPE credits from CCP-eligible training. CPE credits may count toward more than one topic.
- Pass an annual renewal exam per topic.
- Following the three-year period, re-select the program of interest, successfully complete the certification knowledge exam and case study, and pay applicable certification fees to begin a new three-year term.

What training is available?

- Corptax offers a wide selection of courses for both new and advanced users, most of which are eligible for CPE credit. All sessions are taught by experienced trainers and designed to help address real-life issues through case studies. View the [Pass Through learning paths](#) for a series of available courses to help you transition from a beginner to a more advanced user of the Corptax U.S. Compliance product.
- We also recommend a week-long certification preparation program to assess that your knowledge and skills are up to date prior to taking the certification exam. The certification exam is held on the last day of the prep course. The prep course price includes the cost of the certification exam.

Certification preparation training is scheduled at our training centers or a mutually agreeable location with the participant and Corptax. If held at an alternate location, out-of-pocket costs, such as instructor travel and shipping expenses (materials and learning laptops, if used), will be billed in addition to the certification fees.

Program Description

The Corptax Certified Professional: Pass Through Compliance Program is intended for an individual who has a minimum of two years of compliance and product experience, including practical application of the skills and concepts noted in the exam outline below. The candidate is not required to complete training before the exam; however, Corptax offers several training resources, and we recommend that the candidate also study the materials from available courses. The candidate should be able to perform the tasks in the exam outline successfully.

About the Exam

The Corptax Certified Professional: Pass Through Compliance Exam is composed of two parts with the following characteristics:

1. Knowledge exam
 - **Purpose:** To certify knowledge of efficient and quality product usage
 - **Content:** 40 multiple-choice questions
 - **Time allotted to complete the exam:** 60 minutes
 - **Passing score:** 75%
 - **References:** You may reference hard copy materials/documentation during the exam
2. Case study exam
 - **Purpose:** To certify practical application of the compliance process
 - **Content:** Multi-part case study exam executed on a learning environment provided by Corptax Education Services
 - **Time allotted to complete the exam:** Up to four hours
 - **Passing score:** 75%
 - **References:** You may reference hard copy materials/documentation during the exam

Exam Outline

The Corptax Certified Professional: Pass Through Compliance Exam measures a candidate’s knowledge and skills related to the objectives listed below. A candidate should have hands-on experience with Corptax products and have demonstrated application of each of the following features and functions.

Knowledge Exam

Knowledge Exam Topic	Weighting
Setup	28%
Trial Balance, Adjustments, and Allocations	12%
Reviewing Returns and Reports	12%
Special Allocations	13%
Features	13%
Preparing Form 8825 in Corptax	5%
S Corporation Compliance	4%
K-2/K-3 Processing	5%
Partnership e-File	8%
Total	100%

Case Study Exam

Case Study Exam Section	Weighting
Set Up New Entities	19%
Import Trial Balance and Apportionment Data	2%
Post Automatic and Manual Adjustments	7%
Enter Off-trial Balance Data	2%
Enter State Modifications	3%
Review White Paper, Printing, & Posting	9%
Enter Special Allocations	9%
Enter Transfers of Interest and Create Footnote	12%
Process Allocations	18%
Prepare Federal and State Returns	13%
e-File a State Return	6%
Total	100%