

CPE Today · 2027 K2 Technology Conferences

The Digital Tax Office: Intake, Excel, and Security

Modernizing Tax Practice Operations

November 17, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

This one-day conference addresses the operational challenges of the modern tax practice. The program covers four critical areas: practice management, document intake, data security, and technical software skills. Participants will earn 8.0 CPE credits across Taxes, Information Technology, and Computer Software and Applications fields of study.

The curriculum focuses on the practical mechanics of a paperless office. Sessions cover the integration of practice management software with document systems to track returns and manage capacity. Attendees will review the cost of manual paper processes versus automated portals and e-signature mechanics for Form 8879. Security sessions provide a framework for creating a Written Information Security Plan (WISP) and implementing practical controls like MFA and vendor due diligence to meet IRS requirements.

The technical component of the day focuses on Excel for the tax professional. This training moves beyond basic spreadsheets to use Power Query, XLOOKUP, and dynamic arrays for complex tax tasks. Participants will learn to use these tools for basis tracking, multi-state apportionment, and reconciling client exports to tax returns.

Who Should Attend

- Firm owners needing to implement a mandatory Written Information Security Plan.
- Tax managers responsible for capacity planning and return pipeline tracking.
- Practitioners looking to replace manual email and paper intake with automated portals.
- CPAs who need to automate complex tax reconciliations and depreciation schedules in Excel.

What You'll Take Away

- Build a digital practice management stack to track tax returns and manage firm capacity.
- Implement automated client portals and e-signature workflows to eliminate manual document collection.
- Draft a Written Information Security Plan (WISP) that complies with IRS Publication 4557.
- Use Power Query and dynamic arrays in Excel to clean client data and calculate multi-state apportionment.
- Establish incident response and access control protocols for protecting client tax data.

Proposed Agenda

Day One

8:00 AM – 9:40 AM

Workflow, Due Dates, and the Digital Practice Management Stack

Information Technology · Intermediate · 2 CPE

Tracking returns through the pipeline, extension management, capacity planning against the calendar, and integration between practice management, the tax software, and the document system. Business Management & Organization

- Identify common integration gaps between practice management systems and tax preparation software.
- Develop a standardized pipeline for tracking individual and corporate returns through different stages of completion.
- Apply capacity planning techniques to balance staff workloads against compressed tax season deadlines.
- Establish a centralized extension management process to reduce the risk of missed filings.

Prerequisites: Experience managing tax season deadlines and familiarity with basic practice management software concepts. · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

The Paperless Intake: Client Portals, e-Signature, and Document Automation

Taxes · Intermediate · 2 CPE

The traditional tax season cycle often grinds to a halt during the document collection phase. Firms frequently find themselves stuck in a loop of chasing missing records through disorganized emails or managing the physical risk of client shoeboxes. This course examines the financial and operational costs associated with maintaining paper-based workflows and provides a roadmap for transitioning to a modern,...

- Calculate the internal cost and billable time loss associated with manual document collection and paper-based tax workflows.
- Evaluate client portal features to determine which automation tools best fit a firm's specific client demographic.
- Implement automated document request lists that use conditional logic to follow up with clients automatically.
- Apply IRS compliance standards for e-signatures and Knowledge-Based Authentication to the finalization of tax returns.

Prerequisites: A basic understanding of tax practice operations and familiarity with standard electronic filing requirements. · Advance preparation: None

11:30 AM – 12:30 PM Lunch

12:30 PM – 2:10 PM

Securing the Tax Practice: WISP, IRS Pub 4557, and Practical Controls

Taxes · Basic · 2 CPE

Every paid tax preparer is required to have a Written Information Security Plan (WISP), but many firms aren't sure what theirs is supposed to contain, and a downloaded template with the firm's name at the top rarely reflects how the practice actually operates. When a regulator, insurer, or breach investigator asks for documentation, the details matter. This session walks through the WISP section by section using...

- Identify the required elements of a WISP and the purpose of each under IRS Publication 4557
- Describe the documentation that supports a WISP, including a risk assessment and evidence of security controls
- Apply the IRS-recommended security controls to common tax practice scenarios
- Determine what information to request and retain when vetting vendors that store or process client data

Prerequisites: None · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

Excel for the Tax Practitioner

Specialized Knowledge · Basic · 2 CPE

Tax professionals don't need to master every corner of Excel, but they do need a specific toolkit to survive the pressure of tax season. This session focuses on eight essential skills that solve the most common frustrations in the tax department, from messy client data to rigid workpapers. The presentation follows the arc of a tax engagement, showing how practitioners can use Power Query to clean up trial...

- Identify the eight essential Excel functions and features that have the highest impact on tax workpaper efficiency.
- Apply Power Query techniques to automate the repetitive cleanup of inconsistent client data exports.
- Utilize XLOOKUP and dynamic arrays to replace outdated formulas in tax reconciliation schedules.
- Implement the LET function to improve the readability and reviewability of complex tax calculations.

Prerequisites: A basic understanding of Excel functions like SUM and VLOOKUP, and familiarity with the standard tax preparation cycle. · Advance preparation: None

All times Central Time. Proposed agenda — sessions, times and credits may change before the conference. Registration details, final credits and NASBA disclosures are published on the conference page.
https://www.cpetoday.com/conferences/2027/the-digital-tax-office