



# Rhode Island Department of Revenue Division of Taxation

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## Seminar for Tax Preparers: Agenda

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First session: Friday, November 4, 2016, from 9:00 a.m. to 12 noon, CCRI in Warwick  
Second session: Friday, December 2, 2016, from 9:00 a.m. to 12 noon, CCRI in Newport

- 9:00 a.m. to 9:05 a.m.

### **Greetings**

Neena S. Savage, Esq., Acting Tax Administrator, or  
Michael F. Canole, CPA / Chief of Examinations

- 9:05 a.m. to 9:10 a.m.

### **Housekeeping / Introduction**

Neil Downing, EA, MST, CFP® / Chief Revenue Agent

- *Program outline, certificates of completion, staff phone numbers and [tax.assist@tax.ri.gov](mailto:tax.assist@tax.ri.gov)*

- 9:10 a.m. to 9:25 a.m.

### **E-File Update**

Daniel T. Clemence / Chief Revenue Agent, Tax Processing Services, Project Oversight & Development

- *E-file update, including vendor approval process*
- *Credit card and debit card payments*
- *Limited service November 7 through November 14 for computer system conversion*
- *Annual e-file shutdown in late November (for new filing season)*

- 9:25 a.m. to 10:15 a.m.

### **Personal Income Tax Update: Part I**

Leo Lebeuf / Chief Revenue Agent, Personal Income Tax

- *Review of refunds 2016 filing season – fraud and delays*
- *Social Security modification*
- *Property-tax relief credit (Form RI-1040H) update*
- *Other items and reminders*

- 10:15 a.m. to 10:30 a.m.

### **Personal Income Tax Update: Part II**

Matthew Lawlor or Scott Lewis / Principal Revenue Agents, Personal Income Tax

- *Earned income credit changes*
  - *Changes for tax year 2017 (including pension/annuity income)*
  - *Other items and reminders*
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10:30 a.m. to 10:45 a.m.

✦ **Break** ✦

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- 10:45 a.m. to 11:15 a.m.

### **Corporate Income Tax / Pass-Through Entities**

Richard Coia / Principal Revenue Agent, Corporate Tax

- *Conversion to new computer system*
- *Refunds, errors, and billing updates*
- *Affiliated companies now combined*
- *Changes to minimum tax*
- *Changes to annual filing charge for pass-through entities*
- *Changes to original due dates, extended due dates*
- *Other items and reminders*

- 11:15 a.m. to 11:30 a.m.

### **Sales and Use Tax / Excise Tax**

Theriza Salib-lafrate / Chief Revenue Agent, Excise Tax

- *Annual reconciliation*
- *Sales and hotel tax on short-term residential rentals*
- *Acquired real estate conveyance tax.*
- *Other items and reminders*

- 11:30 a.m. to 11:45 a.m.

### **Estate Tax**

Meaghan Kelly, Esq. / Chief Revenue Agent, Estate Tax

- *What's new in Estate Tax*
- *Changes in forms*

- 11:45 a.m. to 12:00 noon

### **Unemployment Insurance Tax / Reminders / Closing Remarks**

Michael F. Canole, CPA / Chief of Examinations



## Rhode Island Division of Taxation Seminar Evaluation Form

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*Thank you for participating in our "Tax Preparers' Seminar." By completing the evaluation form below, you will help us improve our future programs. Please hand your completed evaluation form to the greeter at the door following the seminar to obtain a "Certificate of Completion." Thank you.*

<b>Evaluation</b>	
Name of Seminar Provider:	Rhode Island Division of Taxation
Seminar Name:	"Seminar for Tax Preparers"
Date Seminar was Completed:	Please circle one date: Nov. 4, 2016 <u>or</u> Dec. 2, 2016
Your Name (optional):	
<b>Instructions:</b> Please grade all of the following evaluation points for this seminar. For each one, please assign a number grade, using a scale of 1 to 5, with 5 being the highest.	
1. Were stated learning objectives met?	
2. Were program materials accurate, relevant and did they contribute to the achievement of the learning objectives?	
3. Was the time allotted to learning adequate?	
4. Were the facilities / equipment appropriate?	
5. Were the handout materials <small>[print and/or online]</small> satisfactory?	
6. Were the audio and video materials effective?	
7. Were individual presenters knowledgeable and effective?	

Additional Comments (optional):