

# PREPARING FOR YEAR-END AND

# 2020

With a new Form W-4 arriving in 2020, prepare for the coming changes affecting taxpayers and your organization in the coming year.

Choose from one comprehensive **or** four specialty courses to get you and your organization through 2019 and prepared for 2020.

## PAYROLL

### SPECIALTY COURSES

GOVERNMENT/PUBLIC SECTOR

CANADIAN PAYROLLS

ACCOUNTS PAYABLE/  
DISBURSEMENTS

ADVANCED PAYROLLS

# CONTENT

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## PAYROLL

### Learning Objectives:

- ▶ Learn how the Tax Cuts and Jobs Act will continue to impact your organization
- ▶ Understand the redesigned 2020 Form W-4
- ▶ Find out the latest developments in the resumption of SSA's no match letters
- ▶ Examine the DOL's proposed increase in the white collar exemption salary threshold

[One-Day Seminar](#) | [Webinar](#) | [Webinar On Demand](#) | [Course Book](#)

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## GOVERNMENT/PUBLIC SECTOR

### Learning Objectives:

- ▶ Learn how the Tax Cuts and Jobs Act will continue to impact your organization
- ▶ Understand the redesigned 2020 Form W-4
- ▶ Find out the latest developments in the resumption of SSA's no match letters
- ▶ Identify when government employees are subject to social security and Medicare taxes

[One-Day Seminar](#) | [Webinar](#) | [Webinar On Demand](#) | [Course Book](#)

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## CANADIAN PAYROLLS

### Learning Objectives:

- ▶ Understand the box-by-box instructions on T4, T4-A, and RL-1 tax slips
- ▶ Learn the details on federal and provincial compliance changes for 2019, including electronic T4s as the standard delivery method and future enhancements to the Canada Pension Plan (CPP)
- ▶ Learn how to avoid PIER reporting errors and additional compliance penalties
- ▶ Be aware of the provincial updates from a payroll perspective

[One-Day Seminar](#) | [Webinar](#) | [Webinar On Demand](#) | [Course Book](#)

The IRS reported that \$2.42 trillion paid into the Treasury in FY 2018 was transmitted by employers for employment taxes, which was nearly 70% of all federal revenue.

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## ACCOUNTS PAYABLE/DISBURSEMENTS

### Learning Objectives:

- ▶ Determine the information required to correctly prepare Forms 1099-MISC
- ▶ Be able to file Forms 1099-MISC with the IRS by January 31
- ▶ Review the accounts payable processing changes required by new legislation and regulations
- ▶ Understand how an employee's moving expenses must be reported and taxed

[Webinar](#) | [Webinar On Demand](#)

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## ADVANCED PAYROLLS

### Learning Objectives:

- ▶ Understand the common paymaster rules
- ▶ Identify special expatriate and nonresident alien taxation and reporting requirements
- ▶ Understand taxation and reporting of executive compensation
- ▶ Identify when contributions to Health Savings Accounts are reported on Form W-2

[Webinar](#) | [Webinar On Demand](#)

### Webinars and Webinars On Demand

Get the year-end updates and checklists you need, when you need them, with *Preparing for Year-End and 2020* Webinars and Webinars on Demand.

### Course Materials

For even more convenience, you can order the course materials for these courses:

- ▶ **Payroll Preparing for Year-End and 2020**
- ▶ **Government/Public Sector Preparing for Year-End and 2020**
- ▶ **Canadian Payrolls Preparing for Year-End and 2020**

# PAYROLL

45 ONE-DAY  
CLASSES NATIONWIDE



Find out how Tax Reform is changing federal income tax withholding calculations and Form W-4.

For those who are facing more complex taxation issues, register for the **Advanced Payrolls Preparing for Year-End and 2020** Webinar series today. See page 10 for more details.

**4.** *Preparing for Year-End and 2020*

CITY	DATE	CODE
Arlington/Alexandria, VA	October 28	19PYE18C
Atlanta, GA	October 23	19PYE11C
Baltimore, MD	October 29	19PYE21C
Bloomington, MN	October 21	19PYE01C
Boston, MA	November 4	19PYE32C
Charlotte, NC	October 30	19PYE22C
Chicago, IL	October 23	19PYE10C
Chicago, IL	November 5	19PYE38C
Cincinnati, OH	October 30	19PYE23C
Cleveland, OH	October 28	19PYE17C
Columbus, OH	October 29	19PYE20C
Dallas, TX	November 1	19PYE28C
Denver, CO	November 8	19PYE50C
Des Moines, IA	November 6	19PYE42C
Detroit, MI	November 1	19PYE30C
Ft. Worth, TX	November 7	19PYE45C
Houston, TX	November 5	19PYE37C
Indianapolis, IN	October 31	19PYE29C
Kansas City, MO	October 24	19PYE13C
Los Angeles, CA	October 31	19PYE15C
Milwaukee, WI	October 22	19PYE07C
Minneapolis, MN	November 4	19PYE34C
Nashville, TN	October 31	19PYE25C
New Orleans, LA	November 4	19PYE33C
New York, NY	November 5	19PYE36C
Newark, NJ	November 6	19PYE40C
Newport Beach, CA	October 30	19PYE43C
Omaha, NE	November 7	19PYE46C
Orlando, FL	October 22	19PYE08C
Philadelphia, PA	October 30	19PYE24C
Philadelphia, PA	November 7	19PYE44C
Phoenix, AZ	October 28	19PYE35C
Pittsburgh, PA	October 31	19PYE27C
Portland, OR	October 29	19PYE06C
Raleigh, NC	October 29	19PYE19C
Reston, VA	November 8	19PYE48C
Richmond, VA	October 28	19PYE16C
San Antonio, TX	November 6	19PYE41C
San Diego, CA	October 29	19PYE39C
San Francisco, CA	November 1	19PYE47C
San Jose, CA	October 30	19PYE12C
Seattle, WA	October 28	19PYE03C
St. Louis, MO	October 24	19PYE14C
Tampa, FL	October 21	19PYE05C
Tulsa, OK	November 8	19PYE49C

# PAYROLL COURSE OUTLINE\*

Earn up to: 6 RCHs, 0.6 CEU, or 7 CPE Credits. Fields of Study: Taxes = 5, Business Law = 2

## Year-end Preparation

- ▶ Year-end checklist, accumulators, and project plan
- ▶ Verifying social security numbers
- ▶ Social Security Administration's changes to reporting
- ▶ IRS fights tax refund fraud
- ▶ Verification of employee data, reconciliations, and year-end notices

## State Regulations Impacting Year-end

- ▶ State Annual Reconciliation Return and Magnetic Media/Electronic Reporting
- ▶ State Unemployment and Disability Wage Bases

## Annual Changes

- ▶ Social security wage base
- ▶ Social security/Medicare threshold for domestic employees and election workers
- ▶ Medicare tax rate
- ▶ Retirement plan changes
- ▶ Fringe benefit limitations
- ▶ Federal per diem and mileage rates
- ▶ Federal standard deduction
- ▶ Federal tax levies – Publication 1494
- ▶ Automobile rates
- ▶ Qualified transportation fringe benefit limits
- ▶ Information return and payee statement penalties
- ▶ Affordable Care Act annual adjustments
- ▶ Income exclusion for U.S. citizens living abroad
- ▶ Health Savings Account limits and definitions

## Year-end Reporting and Taxation of Fringe Benefits

- ▶ Taxable fringe benefits
- ▶ Supplemental wages and grossing-up
- ▶ Moving expenses
- ▶ Group-term life insurance
- ▶ Awards, prizes, and gift cards
- ▶ Qualified transportation fringe benefits
- ▶ Loans to employees
- ▶ Deferred compensation
- ▶ Cafeteria and flexible benefit plans
- ▶ Nonqualified stock options

- ▶ Dependent care benefits
- ▶ Adoption assistance
- ▶ Overpayments and repayments
- ▶ Forms 1094-C and 1095-C, third-party sick pay, W-2 retirement plan check box, and health insurance reporting

## Government Issues Review

### Legislative Actions

- ▶ Sweeping tax legislation from the Tax Cuts and Jobs Act continues to affect payroll professionals
- ▶ IRS restructuring legislation includes payroll provisions

### 2019 Legislative Proposals

- ▶ Federal agency budgets and payroll impacts: what's funded, what isn't
- ▶ Mobile Workforce legislation reintroduced
- ▶ Update on status of Uniform Wage Garnishment Act
- ▶ Other proposed legislation

### Regulations and Guidance

- ▶ Latest information on 2020 Form W-4
- ▶ IRS finalizes rules to allow truncating SSNs on employee's W-2s
- ▶ IRS proposes regulations to increase number of electronically filed information returns
- ▶ IRS provides tax relief for victims of federally declared disasters
- ▶ IRS proposes regulations and issues guidance on disaster relief
- ▶ IRS provides guidance on taxation of employer-provided meals
- ▶ IRS updates safe harbor explanations for rollover distributions from certain retirement plans
- ▶ IRS upholds student loan repayment feature under a 401(k) plan
- ▶ IRS provides guidance on treatment of qualified transportation benefit balance when employment is terminated
- ▶ IRS issues guidance on HRAs and HSAs
- ▶ DOL proposes regulations to increase white collar exemption salary threshold

- ▶ DOL proposes regulations to update regular rate determination and to define joint employer status
- ▶ DOL revises guidance for FLSA tip credit and dual jobs
- ▶ DOL issues opinion letters on FLSA topics

### Court Decisions

- ▶ Federal judge rules ACA is unconstitutional
- ▶ Federal court reinstates EEO-1 pay data collection requirement
- ▶ Supreme Court reverses appeals court decision; lost wages for railroad employee were compensation
- ▶ Supreme Court will not review trust fund penalty case
- ▶ Appeals court denies liquidated damages in FLSA overtime ruling
- ▶ Appeals court upholds decision: pay taxes to the IRS first
- ▶ Court rules casino tip pool did not violate FLSA
- ▶ Employer allowed to deduct FMLA time from incentive calculation
- ▶ Court explains regular rate calculations and exclusions for overtime
- ▶ California Supreme Court rules employees may not sue payroll service provider for unpaid wages in addition to employer

### Agency Initiatives

- ▶ IRS continues to encourage employees to conduct a paycheck checkup
- ▶ IRS announces results of two-week employment tax enforcement visits
- ▶ DOL issues opinion letter on worker classification and signs misclassification agreements with additional states
- ▶ SSA resumes sending no match letters
- ▶ NACHA approves rules to expand same-day ACH transactions

## Forms Review and Revisions

- ▶ Form 941, Schedules B, D, and R
- ▶ Form 941-X
- ▶ Forms W-2 and W-2c
- ▶ Forms W-3 and W-3c
- ▶ Form 940
- ▶ Form 1099-MISC



CITY	DATE	CODE
Atlanta, GA	November 4	19GVY03C
Chicago, IL	November 6	19GVY07C
Dallas, TX	November 5	19GVY02C
Denver, CO	October 21	19GVY04C
Los Angeles, CA	October 22	19GVY06C
Minneapolis, MN	November 7	19GVY09C
San Francisco, CA	October 23	19GVY08C
Seattle, WA	October 24	19GVY10C

Understand how Tax Reform is changing Form W-4 and federal income tax withholding calculations.

## GOVERNMENT/PUBLIC SECTOR COURSE OUTLINE\*

### Year-end Preparation

- ▶ Year-end checklist, accumulators, and project plan
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- ▶ Health Savings Accounts

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- ▶ Taxable fringe benefits
- ▶ Supplemental wages and grossing-up

# GOVERNMENT/PUBLIC SECTOR COURSE OUTLINE\*

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- ▶ Moving expenses for military personnel on orders
- ▶ Group-term life insurance
- ▶ Awards, prizes, and gift cards
- ▶ Qualified transportation fringe benefits
- ▶ Loans to employees
- ▶ Deferred compensation
- ▶ Cafeteria and flexible benefit plans
- ▶ Nonqualified stock options
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- ▶ Forms W-3 and W-3c
- ▶ Form 940
- ▶ Form 1099-MISC

## Government/Public Sector Year-end Issues

- ▶ Election workers
- ▶ Jurors' compensation
- ▶ Elected officials
- ▶ Social security/Medicare coverage
- ▶ Section 401(a) employer pick-up plans
- ▶ Converting sick leave to supplemental retirement benefits
- ▶ Section 457(b) plans
- ▶ Section 403(b) plans
- ▶ Differential military pay
- ▶ Military spouse's state income tax exclusion
- ▶ Use of vehicles by law enforcement officers
- ▶ Fair labor standards for state and local governments



CITY	DATE	CODE
Chicago, IL	November 13	19CYE02C
Dallas, TX	November 14	19CYE03C
New York, NY	November 12	19CYE01C
San Francisco, CA	November 15	19CYE04C

Are you prepared to avoid  
the PIER report?

## CANADIAN PAYROLLS COURSE OUTLINE\*

Earn up to: 6 RCHs, 0.6 CEU, or 7 CPE Credits. Fields of Study: Taxes = 5, Business Law = 2

### Legislative Update

- ▶ Federal legislation
- ▶ Provincial legislation
- ▶ Provincial tax rates
- ▶ Update on federal and provincial budget implications

### Reviewing for 2019 Year-end

- ▶ Checking compliance issues
- ▶ Reconciling payroll accounts
- ▶ Identifying the proper forms to use
- ▶ Validating Social Insurance Numbers
- ▶ Recognizing potential PIER report problems
- ▶ Reviewing common reporting errors and how to avoid them
- ▶ Reviewing pension adjustments

- ▶ Obtaining and reviewing the PD7A statement
- ▶ Electronic filing options and requirements

### Completing 2019 Year-end

- ▶ 2019 tax filing requirements
- ▶ Completing the T4 slip
- ▶ Completing the T4A slip
- ▶ How to complete the RL-1 slip in French (Province of Québec)
- ▶ Filing deadlines
- ▶ Other 2019 filing requirements

### 2019 After Filing Need-to-Knows

- ▶ Processing an amended T4, T4A, or RL-1
- ▶ Handling a replacement T4, T4A, or RL-1
- ▶ Dealing with the PIER report

### Implementing 2020 Requirements

- ▶ Changes to Canada Pension Plan, Employment Insurance, and Québec Parental Insurance Plan rates
- ▶ Changes to federal and/or provincial tax rates
- ▶ Changes to workers' compensation maximum assessable earnings
- ▶ Changes to minimum wage rates

### Where to Get Help

- ▶ Using government websites for the Canada Revenue Agency, Service Canada, and Revenue Québec
- ▶ Completing the T4 slip



# WEBINARS AND WEBINARS ON DEMAND

These live, web-based, interactive presentations will provide you with the essential year-end checklist and course materials for each registered segment.

**Delivery Method:** Group Internet-based. CPE credits are not available for Webinars On Demand.

**No advanced preparation or prerequisites required. Program Level: Overview**

Earn: 1.5 RCHs, 0.15 CEU, or 1.5 CPE credits for each webinar segment.

## PAYROLL WEBINAR SERIES

All four segments presented on dates listed.

Course Code: 19PYE00L  
(On Demand: 19PYE00R)

### Segment 1: Year-end Preparation

Field of Study: Taxes  
Presented Live: October 30  
Course Code: 19PYE01L  
On Demand: 19PYE01R

### Segment 2: Year-end Reporting and Taxation of Fringe Benefits

Field of Study: Taxes  
Presented Live: November 1  
Course Code: 19PYE02L  
On Demand: 19PYE02R

### Segment 3: Government Issues Review

Field of Study: Taxes  
Presented Live: November 6  
Course Code: 19PYE03L  
On Demand: 19PYE03R

### Segment 4: Legislative and Regulatory Review

Field of Study: Taxes  
Presented Live: November 8  
Course Code: 19PYE04L  
On Demand: 19PYE04R

## GOVERNMENT/PUBLIC SECTOR WEBINAR SERIES

All five segments presented on dates listed.

Course Code: 19GYE00L  
(On Demand: 19GYE00R)

### Segment 1: Year-end Preparation

Field of Study: Taxes  
Presented Live: October 30  
Course Code: 19PYE01L  
On Demand: 19PYE01R

### Segment 2: Year-end Reporting and Taxation of Fringe Benefits

Field of Study: Taxes  
Presented Live: November 1  
Course Code: 19PYE02L  
On Demand: 19PYE02R

### Segment 3: Government Issues Review

Field of Study: Taxes  
Presented Live: November 6  
Course Code: 19PYE03L  
On Demand: 19PYE03R

### Segment 4: Legislative and Regulatory Review

Field of Study: Taxes  
Presented Live: November 8  
Course Code: 19PYE04L  
On Demand: 19PYE04R

### Segment 5: Year-end Issues That Drive Government Employers Crazy

Field of Study: Business Law  
Presented Live: November 13  
Course Code: 191113PL  
On Demand: 191113PR

\*The five segments of the Government/Public Sector Preparing for Year-End and 2020 Webinar series provide the same learning objectives and content found in the Government/Public Sector Preparing for Year-End and 2020 seminar at the same price as the seminar.

View the complete course  
outlines at  
[www.americanpayroll.org](http://www.americanpayroll.org)

# WEBINARS AND WEBINARS ON DEMAND

## CANADIAN PAYROLLS WEBINAR SERIES

All four segments  
presented on dates listed.  
Course Code: 19CYE00L  
(On Demand: 19CYE00R)

### **Segment 1: Federal Legislative Update: Canada Revenue Agency and Service Canada**

Field of Study: Taxes = 0.5,  
Business Law = 1.0  
Presented Live: December 4  
Course Code: 19CYE01L  
On Demand: 19CYE01R

### **Segment 2: 2019 and 2020 Jurisdictional Changes and Reporting**

Field of Study: Business Law  
Presented Live: December 6  
Course Code: 19CYE02L  
On Demand: 19CYE02R

### **Segment 3: Canadian Federal Year-end Reporting**

Field of Study: Taxes  
Presented Live: December 11  
Course Code: 19CYE03L  
On Demand: 19CYE03R

### **Segment 4: Québec Legislative Update and Year-end**

Field of Study: Taxes  
Presented Live: December 13  
Course Code: 19CYE04L  
On Demand: 19CYE04R

## ACCOUNTS PAYABLE/ DISBURSEMENTS WEBINAR SERIES

All four segments  
presented on dates listed.  
Course Code: 19APY00L  
(On Demand: 19APY00R)

### **Segment 1: Year-end Preparation**

Field of Study: Taxes  
Presented Live: October 2  
Course Code: 19APY01L  
On Demand: 19APY01R

### **Segment 2: Taxation Issues Common to Accounts Payable**

Field of Study: Taxes  
Presented Live: October 4  
Course Code: 19APY02L  
On Demand: 19APY02R

### **Segment 3: Legislation, Regulatory Issues, Agency Guidance, and Court Decisions**

Field of Study: Taxes  
Presented Live: October 9  
Course Code: 19APY03L  
On Demand: 19APY03R

### **Segment 4: State Filing Requirements Impacting Accounts Payable, Annual Changes, and Forms Review**

Field of Study: Taxes  
Presented Live: October 11  
Course Code: 19APY04L  
On Demand: 19APY04R

## ADVANCED PAYROLLS WEBINAR SERIES

All four segments  
presented on dates listed.  
Course Code: 19ADY00L  
(On Demand: 19ADY00R)

### **Segment 1: Advanced Year-end Issues**

Field of Study: Taxes  
Presented Live: October 29  
Course Code: 19ADY01L  
On Demand: 19ADY01R

### **Segment 2: Advanced Fringe Benefit Issues**

Field of Study: Taxes  
Presented Live: October 31  
Course Code: 19ADY02L  
On Demand: 19ADY02R

### **Segment 3: Government Issues Review**

Field of Study: Taxes  
Presented Live: November 6  
Course Code: 19ADY03L  
On Demand: 19ADY03R

### **Segment 4: State Issues, Annual Changes, and Form Review**

Field of Study: Taxes  
Presented Live: November 8  
Course Code: 19ADY04L  
On Demand: 19ADY04R

View the complete course outlines  
at [www.americanpayroll.org](http://www.americanpayroll.org)

# Preparing for Year-End and 2020 | Registration Form

Register for the class or webinar, or order the course materials online: [www.americanpayroll.org](http://www.americanpayroll.org)

Registration form with payment must be received **at least five business days** in advance of the course date to guarantee your registration.

**1 Registration**

**I would like to:**

Register for the following class:

Payroll     Government/Public Sector     Canadian Payrolls

City: \_\_\_\_\_ Course Code: \_\_\_\_\_ Course Date: \_\_\_\_\_

I am an APA MEMBER. ID# \_\_\_\_\_ .....\$489

I am a COLLEAGUE of an APA Member (at the same street address) .....\$599

Colleague's ID #: \_\_\_\_\_

Member's Name: \_\_\_\_\_

Member's ID #: \_\_\_\_\_

I would like to join APA now AND register at the member rate

**Members save up to \$240 when registering for this class!**

Class Registration Fee at Member Rate ..... \$489

Annual Membership Dues\*.....\$254

One-Time Enrollment Fee.....\$35

**TOTAL ..... \$778**

I am not an APA Member or Colleague. ID# (if known).....\$729<sup>1</sup>

Please register me for the following Webinar or Webinar On Demand:

Individual Webinars are \$195<sup>1</sup>. All 4 segments in a series are \$489<sup>1</sup>.  
Note: Government/Public Sector has 5 segments for \$489<sup>1</sup>.

Course Code	Payroll	Gov't/ Public Sector	Canadian Payrolls	AP/ Disbursements	Advanced
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I would like to purchase the course materials for:

Payroll .....\$489<sup>1</sup>

Government/Public Sector .....\$489<sup>1</sup>

Canadian Payrolls .....\$489<sup>1</sup>

**YOUR REGISTRATION INCLUDES:**

- Course materials, including late breaking information
- Onsite networking continental breakfast and luncheon
- Morning and afternoon refreshment breaks

**3 Payment Information**

Payment in U.S. dollars must accompany registration form.  
Currency Converter: [www.xe.com](http://www.xe.com)

**Three Enrollment Options:**

Online  Fax  Mail

[www.americanpayroll.org](http://www.americanpayroll.org) (210) 224-6038 To address below

I authorize the API Fund for Payroll Education, Inc. to CHARGE my:

American Express     Discover     MasterCard     Visa

**Card is:** (check one)     Corporate     Personal

Card #: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ CVV Code: \_\_\_\_\_

Name on Credit Card: \_\_\_\_\_

Signature of Cardholder: \_\_\_\_\_

I agree to the policies for registration, transfer, substitution, cancellation, and refunds found at [bit.ly/APA-policies](http://bit.ly/APA-policies).

Purchase Order #: \_\_\_\_\_ (for government agencies/universities only)

Make CHECK payable and mail to:

**American Payroll Association**  
660 North Main Avenue, Suite 100  
San Antonio, TX 78205-1217

**Email: [apa@americanpayroll.org](mailto:apa@americanpayroll.org) • Visit: [www.americanpayroll.org](http://www.americanpayroll.org)**  
Phone: (210) 224-6406 • M-F, 8 a.m. - 6 p.m. CT

If you require special services, please call Customer Service at least 21 days in advance of the event.

**2 Registrant Information** (please print)

**Registrant's Primary Address**

Name: Ms.  Mr.  \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Province: \_\_\_\_\_ Country: \_\_\_\_\_

Zip + 4-Digit/Postal Code: \_\_\_\_\_ + \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

(Area/Country Code) (Area/Country Code)

Email: \_\_\_\_\_

(For official APA communications, registration confirmations, Payroll Currently, and PAYTECH-Digital)

Please indicate if you are:  CPA     PA (For NASBA reporting purposes)

**Special Dietary Request:**     Vegetarian     Gluten-free     Kosher

**Needed for new member enrollment**

Birth date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Registrant's Secondary/Home Address**

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Province: \_\_\_\_\_ Country: \_\_\_\_\_

Zip + 4-Digit/Postal Code: \_\_\_\_\_ + \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_


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<sup>1</sup>Membership dues are subject to change without notice and are nonrefundable. Membership is on an individual basis; corporate memberships are not available. 100% of membership dues are deductible as an ordinary business expense. An enrollment fee of \$35 is charged to all new members and to reinstate members inactive for more than 90 days.

All sales of the course materials are final. No refunds will be made. Course materials for the one-day class will be shipped immediately after the last class in the series is completed. Course materials for webinars will be emailed for each registered webinar segment.

<sup>1</sup>Prices listed are for Members. Go to [www.americanpayroll.org](http://www.americanpayroll.org) for Colleague and Non-member prices and cancellation policies.

 **Credit for Recertification and Continuing Education:** The APA is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors, through its website: [www.learningmarket.org](http://www.learningmarket.org). The American Payroll Association's CPE sponsor identification number with NASBA is 103152. No prerequisites or advance preparation required. Course level: Update Delivery method: Group Live, Field of Study = Taxes 5, Business Law = 2; Delivery method: Group Internet-Based, Field of Study = Taxes = 6 (Segment 5: Business Law = 1.5). No CPE credits for on demand webinars.

**Complaint Resolution Policy:** The APA will make every effort to resolve complaints regarding NASBA compliance within a reasonable amount of time and in a confidential manner. A formal complaint must be submitted in writing and must set forth a statement of the facts and the specific remedy sought. Submit complaints to: American Payroll Association, Attn: Certification, 660 North Main Avenue, Suite 100, San Antonio, TX 78205-1217. Certification: (210) 226-4600.

**Last updated: July 2019** **EMT: 9V**

FOR OFFICE USE ONLY:

Date: \_\_\_\_\_ Order #: \_\_\_\_\_ Batch #: \_\_\_\_\_

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