

# StoneRiver Training

## Education Opportunities

High performance software is a requirement for business success—the other essential element is knowledge. With this in mind, StoneRiver offers a range of informative courses for new and existing users.

You will find courses on statutory accounting and NAIC updates, in addition to user training for each StoneRiver system.

**CPE Credits** can be earned for any training course in this catalog. Please review registration details on page 21 as you prepare to register.

## StoneRiver Training Center

We recommend *hands-on* training courses for new users. Comprehensive, uninterrupted instruction ensures that you understand the system well enough to use its primary features. Hands-on training is provided at the StoneRiver Training Center in Cedar Rapids, Iowa.

- eFreedom Annual Statement
- Reinsurance
- TRACKER Unclaimed Property

## Web-based Training

A majority of the StoneRiver training courses are available from the convenience of your desktop. If you have an Internet connection and a phone, you're ready to take advantage of remote learning. Benefits:

- Lower tuition
- Multiple attendees
- No travel expense
- Less workload backlog

You may connect to a web-based training from a conference room and use a speaker phone to train your entire group.<sup>1</sup> There is one charge per log-in, and no limit to the number of people who can attend.

## Quality Instruction

StoneRiver Web-based training courses are live events with two-way dialog that facilitate interaction and clarification. Our instructors are subject matter experts who can answer your questions and provide background information. You'll be able to apply your new knowledge immediately.

## Custom Training

StoneRiver product experts can tailor training content for your specific business needs. We'll bring customized training to your office, or tailor Web-based instruction to meet your organization's specific requirements.

Call us today at 800-373-3366 ext 85716.

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<sup>1</sup> Note: A separate log-in is required for each person earning CPE credit to verify attendance for NASBA.

# StoneRiver 2012 Course Schedule

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# eFreedom Annual Statement

Two-day hands-on seminar. This is a group-live training at the StoneRiver Training Center.

## Objective

Learn to install and configure eFreedom Annual Statement software, and apply the processes necessary to complete your NAIC submission files. This basic level course will cover Annual and Quarterly Statement preparation.

## Agenda

- Overview of Client Services & Support
- eFreedom Annual Statement Installation
  - System Requirements
  - System Installation
  - Statement Module Installation
- Administration
  - System Management
  - Security Management
  - User Management
  - Company Management
  - Statement Management
  - Updates
- Statement Preparation
  - Identifier Management
  - Editing Identifiers – Fixed, Expandable, Free-Form
  - Processing Special Identifiers
  - Imports and Exports
  - Validations
  - Creating NAIC Submission Files
  - Reports
  - Combined (P&C) / Accumulated

## Intended Audience

Personnel responsible for filing annual statement reports and new StoneRiver clients. No prerequisites, but basic understanding of statutory accounting and annual statements is required. Advance Preparation: None.

## Estimated CPE Credit

12 credit hours

## Tuition

\$1,200 (two day seminar)

## Dates and Times

Tuesday - Wednesday, June 19 – 20

Tuesday - Wednesday, August 21 - 22

Wednesday - Thursday, December 5 - 6

Course begins at 9:00 a.m. and concludes by 4:00 p.m.

# eFreedom Refresher – Special Identifiers

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

eFreedom Annual Statement offers some unique time-saving options and features for Special Identifiers. Attend this course for an in-depth review of each Special Identifier as well as tips on how to complete these schedules in the most efficient manner. You will also learn how to use the newly added PDF attachment feature for the free-form pages such as the Notes to Financial and Schedule Y.

## **Agenda**

- Cover Page
- Jurat Page
- Cash Flow and Cash Flow Workpaper
- Notes to Financial Page
- Organization Chart
- Risk Based Capital Pages
- Schedule P and Schedule P Workpapers
- State Pages
- Direct Business Excel Template
- Synopsis Forms
- User-Specific Topics by Request

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and reporting is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

2 credit hours

## **Tuition**

\$400

## **Dates and Times**

Tuesday, June 12

1:00 p.m. – 3:00 p.m. Central Time

# eFreedom Refresher – Statement Preparation

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

This information-packed course provides step by step training on the statement preparation process to produce electronic files for annual and quarterly filings. It includes an overview of administrative actions necessary to create a current period statement, as well as data entry tips for editing fixed/expandable/free-form schedules. You'll also learn best practices for reviewing validations and NAIC file generation based on regulatory requirements as defined in NAIC Blanks and Instructions. This group internet-based course is the perfect cost-effective refresher for current eFreedom users.

## **Agenda**

- Administration
- Install modules, update company information and add a statement
- Edit Identifiers
- An overview of data entry on fixed, expandable and free-form identifiers
- Importing and Exporting Data
- Validation and Resolution
- NAIC Submission File Creation
- User-Specific Topics by Request

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and reporting is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

3.5 credit hours

## **Tuition**

\$500

## **Dates and Times**

Wednesday, June 13

1:00 p.m. – 4:00 p.m. Central Time

# eFreedom Software Update

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

Our Software Update webinar is loaded with news about new eFreedom software features, product support tools, and general software information. See the latest eFreedom enhancements as well as tips and tricks for preparing the statement within the StoneRiver software.

## **Agenda**

- **Annual Statement Client Services & Support**  
We will describe the full range of Annual Statement support resources available to you. You will learn the most efficient way to access customer service, and how to subscribe to email notifications for State Checklist Direct and our NAIC Focus newsletter.
- **NAIC Software Enhancements**  
An overview of the latest software enhancements will be provided. You will learn the benefits of the new enhancements and how they will help you complete the filings more efficiently.
- **Tips and Tricks**  
You will learn about features that simplify your statement preparation, and new ways to streamline the process. These tips and tricks shave time and effort off your quarterly and annual filings. You will understand how the features discussed can help in your workflow.

## **Intended Audience**

The seminar is intended for experienced regulatory software users. No prerequisites are required. Advance Preparation: None.

## **Estimated CPE Credit**

3 credit hours

## **Tuition**

\$300

If combined with NAIC Update, total fee: \$450

## **Dates and Times**

Tuesday, December 4

Wednesday, December 5

Thursday, December 6

9:00 a.m. – 11:30 a.m. Central Time

# Accounting and Reporting for Investments

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

This course provides participants with a basic understanding of the different types of invested assets and the appropriate statutory accounting/reporting of those assets. The discussion includes the general concept of investment limitations established by each state's insurance regulatory authority. The 2012 accounting and reporting changes will be included. Be up-to-date!

## **Agenda**

- Schedules A, B, BA, D, DI, and E
- The Securities Valuation Office (SVO)
- Impairment of Invested Assets
- Summary Investment Schedules
- Supplemental Investment Interrogatories
- Statutory Accounting Principles Affecting Investments
- User-specific Topics by Request

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and reporting is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

7.5 credit hours

## **Tuition**

\$600

## **Dates and Times**

Wednesday and Thursday, June 27-28

Tuesday and Wednesday, October 30-31

12:00 p.m. – 3:30 p.m. Central Time each day

# Basic Statutory Accounting

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

This course assists the beginning statutory accountant in recognizing accounting differences between GAAP accounting and Statutory accounting for all insurer types. Participants will have a better understanding of why the differences are deemed necessary by regulators. In addition, specific statutory terminology is explained.

## **Agenda**

- Regulation of Insurers
- What Is Statutory Accounting?
- Valuation of Assets
- Reporting of Liabilities
- Accounting for Income and Expenses
- The Effects of Reinsurance on Accounting and Reporting

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and reporting is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

7.5 credit hours

## **Tuition**

\$600

## **Dates and Times**

Tuesday and Wednesday, July 17 - 18

Tuesday and Wednesday, October 2 - 3

12:00 p.m. – 3:30 p.m. Central Time each day

# Schedule F – P&C Reinsurance Reporting

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

This is a basic level course. This course allows the attendee to obtain an understanding of the Schedule F statement reporting formats, discusses authorized and unauthorized reinsurers, and covers some of the basic reinsurance concepts.

## **Agenda**

- Basic Reinsurance Concepts
- Schedule F Completion
- Authorized vs. Unauthorized Reinsurers
- Calculation of the Provision for Reinsurance (Reinsurance Penalty)
- Reinsurance General Interrogatories
- Reinsurance Attestation

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and statements is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

3 credit hours

## **Tuition**

\$300

## **Dates and Times**

Thursday, August 23

1:00 p.m. – 3:30 p.m. Central Time

# Health Risk-Based Capital (HRBC)

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

This is a basic level course. This course provides attendees with an overview of how HRBC fits into the current regulatory environment, an understanding of the different HRBC components, and the tools to interpret their company's results. This is a group internet-based offering.

## **Agenda**

- History of Risk-Based Capital Formula Development
- Completing the Different HRBC Components
- Interpretation of HRBC Results
- Reporting of HRBC Results in the Annual Statement

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and statements is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

3.5 credit hours

## **Tuition**

\$400

## **Dates and Times**

Tuesday, September 18

12:00 p.m. – 3:30 p.m. Central Time

# NAIC Update and Blank Changes Health, Life or P&C

This is a group internet-based training event. Separate sessions are offered for LAH, Property & Casualty and Health insurers. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

Upon completion of this course, participants will have the most recent accounting and reporting information regarding changes adopted by the National Association of Insurance Commissioners (NAIC) for year-end 2012 reporting.

## **Agenda**

- Annual Statement Reporting
- Risk-Based Capital
- Accounting Update
- Year-end Pending Issues
- On-going NAIC Activities

## **Intended Audience**

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and reporting is helpful, but not required. Advance Preparation: None.

## **Estimated CPE Credit**

3 credit hours

## **Tuition**

\$400

If combined with eFreedom Update, total fee: \$450

## **Dates and Times**

P&C Blank Changes: Tuesday, December 4

Health Blank Changes: Wednesday, December 5

Life (LAH) Blank Changes: Thursday, December 6

1:00 p.m. – 3:30 p.m. Central Time

# PRO Financial 1099 Processing

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

Develop or enhance a working knowledge of generating 1099 data for export using PRO Financial.

## **Agenda**

- Explain the process of setting up and preparing Federal Reporting information using Export functionality in the PRO Financial Accounts Payable module.
- Step-by-step instructions on how to set up vendors as 1099 vendors and create the 1099 business rules for data export.
- Learn how to maintain the 1099 maps within PRO to export to outside federal reporting applications (examples: StoneRiver PTE Federal Reporting System, Convey Compliance).

## **Intended Audience**

Personnel responsible for generating 1099s for their company. No prerequisites, basic understanding of PRO Financial required. Advance Preparation: None.

## **Estimated CPE Credit**

1 credit hour

## **Tuition**

\$200

## **Dates and Times**

Tuesday, January 10

Tuesday, December 11

1:00 p.m. – 2:00 p.m. Central Time

# PTE Financial Federal Reporting and 1099 Processing

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

Develop or enhance a working knowledge of generating 1099s using PTE Federal Reporting module.

## **Agenda**

- Imports into Federal Reporting (from other PTE modules and/or ASCII file)
- 1099 Maintenance (Add, Delete, Change)
- Reports
- 1099 Printing (Original and Corrected Returns)
- Filing with the IRS

## **Intended Audience**

Personnel responsible for generating 1099s for their company. No prerequisites, basic understanding of PTE required. Advance Preparation: None.

## **Estimated CPE Credit**

1 credit hour

## **Tuition**

\$200

## **Dates and Times**

Thursday, January 12

Thursday, December 13

1:00 p.m. – 2:00 p.m. Central Time

# Freedom Reinsurance System (FRS) Refresher

This is a group-live training at the StoneRiver Training Center.

## Objective

Enhance the current client's working knowledge of the functionality and process flow of the Freedom Reinsurance System (FRS). New system enhancements will also be addressed.

## Agenda

- Introduction & Overview
  - System Cycle Overview
  - Training Objectives
- System Setup
  - Reinsurance Startup
  - System Menu Definition
  - Table Definition
  - Table Setup
  - Import/Export Tables
- Contract Maintenance - Treaty
  - Contract Overview
  - Master Contracts
  - Sub Contracts
  - Contract Workshop
  - Copy and Renew Features
  - Contract Approval Levels
  - Client Contract Review
- Contract Maintenance - Facultative
  - Certificate Overview
  - Policy Information
  - Certificate Setup
  - Reinsurer Setup
  - Communication
  - Coverage
  - Criteria
  - Facultative Workshop
  - Copy Features
  - Import Facultative Certificates
- December Claim Cycle
  - Cession Processing
  - Working with Claim Data
- January Premium and Claim Cycle
  - Cession Processing
  - Working with Premium Data
  - Working with Claim Data
- Special Processing
  - IBNR/LAE Reserve Entry
  - Collateral
  - Schedule F Processing
  - Schedule P Processing
  - General Ledger Interfacing
  - Direct Data Entry
  - Premium Archive
  - Financial Clear Executable
  - Unapprove Contracts or Facultative Certificates
  - Contract Pipeline Executable
- Security Setup

## Intended Audience

Reinsurance personnel responsible for any of the phases of the reinsurance process, who want to refresh their knowledge and review the new features of the reinsurance system, from contract setup to cash management to reporting. No prerequisites, however an understanding of reinsurance terminology and your company's current reinsurance processing flow is essential. Experience with Windows is necessary. Advance Preparation: None.

## Estimated CPE Credit

30 credit hours

## Tuition

\$2,000 (five day seminar)

## Dates and Times

Monday - Friday, May 7 - 11

Monday - Friday, November 5 - 9

Course begins at 9:00 a.m. and concludes by 4:00 p.m.

# TRACKER Unclaimed Property System

Three-day hands-on seminar. This is a group-live training at the StoneRiver Training Center.

## Objective

Develop a working knowledge of the features and functions of the StoneRiver TRACKER Unclaimed Property System.

## Agenda

- Intro to Unclaimed Property
- Introduction to TRACKER
  - Tables
  - Applying Updates
- Holder Maintenance
- Import Records
- Maintaining Records
  - Group Modify
  - Compress/Repair
- Reports
  - Generating Internal Reports
- Custom Reporting
- Data Validation
- Transaction Log
- Due Diligence
  - Search Letters
  - Barcode Scanning
- State Report Preparation
- Generating State Report
  - Filing Methods
  - Preliminary and Final
  - Filing Formats
  - Single State
  - Multiple States
- Other report options and formats
- Historical Activities
  - Purge
  - Update Check Numbers
  - Generating Internal Reports
  - Export Historical Records
- Task Scheduler
- Scheduling Processes
- Security & E-mail Notification

## Intended Audience

Personnel responsible for filing unclaimed property reports and/or maintaining unclaimed property records; including IT personnel. No prerequisites, basic understanding of unclaimed property and experience with Windows necessary. Advance Preparation: None.

## Estimated CPE Credit

18 credit hours

## Tuition

\$1,800 (three day seminar)

## Dates and Times

Monday - Wednesday, February 6 - 8  
Monday - Wednesday, April 16 - 18  
Monday - Wednesday, June 11 - 13  
Monday - Wednesday, August 13 - 15  
Monday - Wednesday, October 15 - 17  
Wednesday - Friday, December 12 - 14

Course begins at 9:00 a.m. and concludes by 4:00 p.m.

# TRACKER Due Diligence Refresher

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## Objective

Develop or enhance a working knowledge of the due diligence features and functions of the StoneRiver TRACKER Unclaimed Property System.

## Agenda

- The Due Diligence presentation will recommend a monthly, step-by-step procedure to streamline your due diligence process.
- Determine how many search letter form letters need to be created.
- Determine how many letters should be sent to an owner.
- Determine the search letter distribution schedule.
- Determine if postage/search letter fees will be deducted, where states allow.
- Determine if it's necessary to create labels.
- Determine if a set of letters distributed should be printed and archived.
- Discuss and generate monthly due diligence letters, customer service search letters, follow-up customer service search letters and the search letter summary report.
- Discuss using the Procedural Help.

## Intended Audience

Personnel responsible for generating search letters and/or due diligence letters for their company. No prerequisites, basic knowledge of the TRACKER Unclaimed Property System required. Advance Preparation: None.

## Estimated CPE Credit

2 credit hours

## Tuition

\$400

## Dates and Times

Friday, January 20	Thursday, August 16
Friday, March 16	Thursday, September 20
Thursday, April 19	Thursday, October 18
Friday, May 11	Friday, November 2
Wednesday, June 6	Monday, December 10
Wednesday, July 25	

1:00 p.m. – 3:00 p.m. Central Time

# TRACKER Importing Refresher

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## Objective

Develop or enhance a working knowledge of the data mapping and import functions of the StoneRiver TRACKER Unclaimed Property System.

## Agenda

The importing presentation will take you step-by-step through the data mapping and importing process within TRACKER. During an internet-based demonstration, we will explain how to:

- Determine the resources of the data that need to be imported.
- Prepare files that are in an ASCII file layout, Excel format, or Comma Separated Delimited format.
- Create and define an Excel spreadsheet file mapping prior to import.
- Discuss Overwrite, Update, and Enable Multiple Holder import options.
- Determine how TRACKER identifies duplicate records.
- Discuss the Enable Multiple Holder Import, Overwrite, Update and Field Default options.
- Discuss the Load Report and Load Summary.
- Determine appropriate time to use the Rollback Import.

## Intended Audience

Personnel responsible for mapping and importing data into TRACKER for their company. No prerequisites, basic knowledge of the TRACKER Unclaimed Property System required. Advance Preparation: None.

## Estimated CPE Credit

2 credit hours

## Tuition

\$400

## Dates and Times

Friday, January 13  
Thursday, March 15  
Friday, April 13  
Thursday, May 10  
Tuesday, June 5

Tuesday, July 24  
Thursday, August 9  
Friday, October 12  
Thursday, November 1  
Friday, December 7

1:00 p.m. – 3:00 p.m. Central Time

# TRACKER Navigation Refresher

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## **Objective**

Enhance the user's ability to navigate through key areas of the StoneRiver TRACKER Unclaimed Property System.

## **Agenda**

The TRACKER Navigation demonstration is not designed to replace the other TRACKER training options, but it is designed to give the casual user a general understanding on how to navigate throughout the TRACKER system. During a Web-based demonstration, we will:

- Navigate from the main screen of TRACKER.
- Access, add, and edit holder information.
- View records in the current and historical databases.
- Explore the various TRACKER tables.
- Understand data mapping and importing concepts.
- Discuss internal and state reports.
- Discuss owner notification options.
- Examine Help menu Options.
- Review various security features within the system.

## **Intended Audience**

Personnel responsible for the day-to-day operation of TRACKER for their company. No prerequisites, basic knowledge of the TRACKER Unclaimed Property System required. Advance Preparation: None.

## **Estimated CPE Credit**

2 credit hours

## **Tuition**

\$400

## **Dates and Times**

Friday, February 10

Friday, April 6

Friday, September 14

Wednesday, November 14

1:00 p.m. – 3:00 p.m. Central Time

# TRACKER NY Advertising Refresher

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## Objective

Develop or enhance a working knowledge of the NY Advertising features and functions of the StoneRiver TRACKER Unclaimed Property System.

## Agenda

- Basics of TRACKER
- Holder Information
- Data Validation
- Maintaining Owner Records
- Compress/Repair
- Internal Reporting - Preview
- New York Advertising
  - Overview of Holder Classification, Scheduling and Other Requirements
- Overview of New York Advertising methods and property requirements
- Holder Information accuracy – Filing Year, Holder Classification
- Creating Advertising Files(s) to be submitted to publication(s)
- Property Type Code Selection
- Allocating Costs to advertised owner records, according to method
- Utility Companies are not allowed to apply advertisement costs

## Intended Audience

Personnel responsible for generating NY Advertising files for their company. No prerequisites, basic knowledge of the TRACKER Unclaimed Property System required. Advance Preparation: None.

## Estimated CPE Credit

2 credit hours

## Tuition

\$400

## Dates and Times

NY Advertising for Insurance	Monday, April 23
NY Advertising for Banks	Friday, May 18
NY Advertising for Utilities	Thursday, June 21

1:00 p.m. – 3:00 p.m. Central Time

# TRACKER State Reporting Refresher

This is a group internet-based training event. If you wish to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

## Objective

Develop or enhance a working knowledge of the state reporting features and functions of the StoneRiver TRACKER Unclaimed Property System.

## Agenda

- Basics of TRACKER
- Data Validation
- Holder Information
- Compress/Repair
- Reporting & General Notes
- State Reporting
  - Filing Direct or Reciprocal
  - Colorado Deductions
  - Exemptions
  - Special state reporting formats - Mineral Interest, Safe Deposit Box, Securities, Life Insurance
- Preliminary Paper Report – Processing Month (Internal Review Only)
- Final Reports – Processing Month
- Rollback State Reports
- Other Filing Methods:
  - Combined Electronic
  - Express
- Historical Activities
- Task Scheduler
- Procedural Help

## Intended Audience

Personnel responsible for filing unclaimed property reports. No prerequisites, basic knowledge of the TRACKER Unclaimed Property System required. Advance Preparation: None.

## Estimated CPE Credit

2 credit hours

## Tuition

\$400

## Dates and Times

Friday, February 24  
Friday, March 23  
Friday, April 20  
Thursday, May 17  
Thursday, June 7

Thursday, July 26  
Friday, August 17  
Friday, September 21  
Friday, October 19  
Tuesday, December 11

1:00 p.m. – 3:00 p.m. Central Time

# Important Registration and Refund Information

*Please register at least ten business days prior to your preferred course.*

1. Register online at <http://www.stoneriver.com/content/education>.
2. A valid email address is very important. A confirmation email will be sent to all registrants.
3. If space is not available, we will contact you to discuss alternate dates. For training conducted at our Training Center, due to our minimum attendee requirements, please do not make your final travel reservations until you have received email confirmation of your registration from a StoneRiver representative.
4. StoneRiver reserves the right to cancel a course if the number of registrants does not meet our minimum class size. Sufficient notice will be provided to all affected registrants and all tuition will be refunded if alternate dates cannot be selected.
5. If you cancel your registration and request a replacement course, your tuition will be applied to your replacement if we are notified of the change.
6. Cancellations received up to ten business days prior to the course start date are refundable. All others are subject to the entire course fee. Substitutions may be made at any time. Please note that if you do not cancel and do not attend, you are still responsible for payment.
7. Individual registrations are required for CPE credits.
8. For web-based training, the person logged into the webinar will be the only participant eligible for CPE credits. If CPE credits are not required for additional participants, you may have an unlimited number of participants per connection in your office.
9. For more information regarding administrative policies, refunds, or complaints, please call 800-373-3366, ext. 85716.

## Hotel & Travel Information

Tuition covers instruction and course materials. **Attendees should make their own arrangements for the lunch break.** Dress code for classes is casual. Expenses for hotel, airfare and meals **are not included** in the tuition for training conducted at the StoneRiver location in Cedar Rapids, Iowa.

### Hotel Accommodations

Cedar Rapids Marriott  
1200 Collins Road NE  
Cedar Rapids, IA 52402  
800-396-2153 or 319-393-6600  
[www.marriott.com/cidmc](http://www.marriott.com/cidmc)

Hampton Inn – Cedar Rapids  
3265 6th Street SW  
Cedar Rapids, IA 52404  
319-364-8144  
[www.hampton.hilton.com](http://www.hampton.hilton.com)

Residence Inn by Marriott  
1900 Dodge Road NE  
Cedar Rapids, IA 52402  
319-395-0111  
[www.marriott.com/cidri](http://www.marriott.com/cidri)

Fairfield Inn & Suites Cedar Rapids  
605 32<sup>nd</sup> Avenue SW  
Cedar Rapids, IA 52404  
888-236-2427 or 319-247-1000  
[www.fairfieldinn.com/cidcr](http://www.fairfieldinn.com/cidcr)

To receive our special rate, please mention StoneRiver when making your reservations. If you need additional hotel suggestions, please call 800-373-3366, ext. 85716.

### Transportation to the Hotel and to StoneRiver

Transportation is the attendee's responsibility. We recommend a rental car, available at the airport.



## Continuing Education Credit

StoneRiver provides CPE credit because we understand that continuing education is important to you. Sponsored learning activities are measured by program length, with one 50-minute period equal to one CPE credit. One-half CPE credit increments (equal to 25 minutes) are permitted after the first credit has been earned in a given learning activity. Please refer to individual course listings to find specific CPE credit hours. Certificates of completion are given at the conclusion of each course.

StoneRiver 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).

## StoneRiver Lifeline

StoneRiver Lifeline, our Web-based customer support service, saves you time by providing easy access to product files, current industry information, and support personnel. Log on to Lifeline and automatically search a Frequently Asked Questions (FAQ) database, post specific questions for product support to resolve, upload and download product files, update your user profile and company data, participate in threaded discussion forums with peers, and much more.

### **How can I register for Lifeline?**

Simply go to <https://lifeline.stoneriver.com> and complete the online form. You will receive a User ID and password via e-mail, with instructions on entering the site.

## NAIC Focus

NAIC Focus is an online forum that keeps you in closer touch with current NAIC issues. Connie Jasper Woodroof, our Liaison to the NAIC, uses this forum to share information and insight into regulatory reporting requirements, electronic filing directives, instructions, and the latest NAIC hot topics. Clients can subscribe to the NAIC Focus at [www.stoneriver.com/focus](http://www.stoneriver.com/focus) and receive an automatic email notification each time a new column is posted.