

## RE: Tax Prep Guide - Production process



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Retention Policy INDG - 1 Year Inbox Delete (1 year)

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Public

- 34 Tabs (chapters) provided by TaxBook; organized in house by groups of Forms
- Additional Form SS-8, created in house
- Practice tools (i.e., checklists), created in house

### Update Process:

- TaxBook:
  - sends PDF, and HTML files via SFTP late November
- TPQA:
  - stores incoming files on I drive by year (!:\Tax&Accounting\Operations\Production\Books\Federal\Tax Prep Guide)
  - provides vendor (Infocon) with doc ids for Tabs, and sample hyperlinks for common cites (evergreen) (!:\Tax&Accounting\Operations\Production\Books\Prep Guide\Tax Prep Guide 2023)
  - cleans up PDFs (propriety refs, artwork, passwords, etc.)
  - assigns Infocon Tabs via Jira tickets (e.g., <https://jira.bna.com/projects/TPQA/queues/issue/TPQA-28713>)
- Infocon:
  - adds hyperlinks to cites, x-refs, and builds TOC for each Tab
  - leaves completed Tabs on I drive
- TPQA:
  - reviews completed Tabs returned by Infocon
  - uploads Tabs on BDMS
  - receives checklists from analysts to publish around February
  - republishes Form SS-8
  - tracks whole process on Confluence (<https://confluence.bna.com/pages/viewpage.action?spaceKey=TPQA&title=2023+Tax+Prep+Guide+Tracker>)

### Additional Updates:

- TaxBook issues corrections, last-minute updates after all Tabs are published
- TPQA integrates updates in house, and replaces old Tabs