

August, 2006

Issue 2006.8

## **ExacNews**

### **ExacTax Client:**

We would like to thank everyone who took time from their summer schedules to meet with Richard to share their ideas and suggestions for improving our system. Your input is highly valued and helps us to focus on the areas that are of the greatest importance to you. Some preliminary changes were presented at the meetings and we have continued to incorporate suggestions received so far into the 2006 forms. Last year's meetings directly improved the quality of the 2005 processing season and this year's meetings will continue to enhance our program for 2006.

**Reruns with Special Handling:** When special handling instructions, such as expedited processing, special shipping or a different shipping address, are entered on Input Form PI they remain in effect each time the return is reprocessed. Customer Support will normally reconfirm these items when entering a rerun. However it is the caller's responsibility to confirm any changes to the original entries are made.

**Remote Data Entry Renewals:** Renewal forms for RDE users have been mailed out. If you have not received your RDE renewal, please contact Customer Support.

**Batch Renewals:** Renewal forms for batch processors will be mailed during the August/September timeframe.

**Additional Diagnostics:** Every return includes a Federal Diagnostics page and a state diagnostics page for each state return. These contain important warnings, alerts and comments that should be reviewed closely. In addition, ExacTax will now generate separate diagnostics, when applicable, for items not covered by the general diagnostics page. Look for these on the Shipping Sheet that is on the front of the return package.

**Extension Returns:** Now that the automatic extension deadline has been moved to October 16, 2007 we are seeing more and more filers waiting until the last minute. Don't get caught in the last minute crush; get your clients' returns in as soon as possible. In addition, review your supplies to make sure that you have adequate amounts to make it through. There is **no second extension** to fall back on.

**Extension Return Instructions:** By default the 1040 client letter will instruct your client to file the return by April 17, 2006. To change this date you must either enter the extended/filing date on Form EXT [4], **zip box 2** or select Automatic Feature #151 to print "As soon as possible" when no extension date is entered. This feature applies to federal and state returns. To print a different filing date for the state, you must enter the state extended/filing date in the applicable state box. For California returns, use Form CAEst [6], **zip box 24**.

**Note:** An entry in the state extension date will automatically trigger the computation of late interest and penalties on balance due returns. These can be suppressed by using the applicable boxes on the state penalty form. For California returns, use Form CAPen [5], **zip boxes 3, 4 and 5**.

**Holiday Reminder:** ExacTax will be closed on Labor Day Monday, September 4th.



**Billing Queries and Reminders:** When requesting adjustments to your billing, state the problem in the comment section of your remittance and mail in with your payment. Any problems or questions regarding billing queries may also be faxed directly to the Accounting Department at 714-999-6566. Requests for credit must be made in writing.

**IMPORTANT:** *Accounts with an outstanding balance over 21 days will be placed on C.O.D. status. C.O.D. accounts will be shipped UPS C.O.D. for the balance past due plus the returns currently being shipped.*

**Summer Customer Support Hours:** Our Customer Support Department is open Monday through Thursday from 8:30 A.M. to 5:00 P.M.; Fridays from 8:30 A.M. to 12:30 P.M. All times are Pacific Time. The direct number for Customer Support is 800-254-2244. Please have your six digit account number ready when calling regarding any type of questions; billing, input procedures, return status and/or technical tax questions. If you need to fax any information to Customer Support, the number is 714-254-7210.

**Telephone Reruns and Supply Orders:** To process Telephone Reruns or order supplies, call 800-786-4272. The operating hours are the same as for Customer Support. When calling in a Telephone Rerun, please have all information ready, including the form number or form name, form section and box number for the changes. Always have your account number, the log number of the return and the needed changes ready for the Telephone Rerun Representative. In order to be processed and ready for shipment the following day, Telephone Reruns must be called in by 4:30 P.M.

## Important ExactTax Telephone Numbers

Main numbers	714-284-4802	800-352-3638
<b>Customer Support</b>	<b>800-254-2244</b>	
Telephone Rerun	714-239-6139	800-786-4272
Electronic Filing	714-254-7213	
Main fax	714-284-4814	
Customer Support fax	714-254-7210	
Accounting fax	714-999-6566	

Street address: **2301 W Lincoln Ave #100**  
**Anaheim, CA 92801**

Or mail to: **P.O. Box 61048**  
**Anaheim, CA 92803-6148**

To contact us by e-mail, use the following addresses:

- Sales..... **exsales@exactax.com**
- Customer Support..... **exsupport@exactax.com**
- Electronic Filing..... **efrdeaut@exactax.com**
- Technical Support..... **extech@exactax.com**
- Administrative..... **exadmin@exactax.com**
- Accounting..... **exaccts@exactax.com**

Also, visit our improved web site: <http://www.exactax.com>