

July 16, 2007

Issue 2007-18

## **ExacNews**

### **ExacTax Client:**

We would like to thank everyone who took time from their summer schedules and met 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 great suggestions were presented at the meetings and we are working to incorporate them onto the 2007 forms. Last year's meetings directly improved the quality of the 2006 processing season and this year's meetings will continue to enhance our programs for 2007.

**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 change any previous requests, when applicable.

**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.

**Credit Card Authorization:** Once you have completed an ExacPay authorization form to automatically charge your invoice to a credit card, it will remain in effect until canceled. If you also make a payment by check your account will end up with duplicate payments.

**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 generates a separate diagnostic page, when applicable, for items not covered by the general diagnostics page. Look for these on the Shipping Sheet at the front of the return package.

**Extension Returns:** Now that the automatic extension deadline has been moved to October 15, 2007, 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 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, 2007. 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. The automatic 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 [6A], **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

