

November 1, 2007

Issue 2007-24

## **ExacNews**

### **ExacTax Client:**

The 2007 Tax Organizer order forms began shipping this week. To request changes to be included in the first run, you must return your order forms by **November 16<sup>th</sup>**. The first run of organizers is scheduled to begin shipping before the end of November.

If you do not request any changes, **OR** you do not return the order form, organizers will be printed based on your original selections shown on your order form. **You will be billed for all printed Organizers and credit will not be issued.** To make changes to a taxpayer's address on the organizer, labels and proforma, submit changes on the 2007 Taxpayer Address Change Request Form included with the Tax Organizer Order Form.

⇒ **Tax Organizers will not be printed for non-renewed or C.O.D. accounts. Late renewal or C.O.D. status will delay the shipping of organizers, proforma and supplies.**

### **Labels**

A complete set of client labels will be shipped at the same time as the Tax Organizers, at no additional charge. The set contains two labels for each 1040 return processed by October 29th. An order form for requesting additional billable label sets will be included. To order billable labels prior to November 30th, contact Customer Support.

### **2008 Workshops Schedule Released**

The 2008 Exactax workshop schedule and workshop registration forms were included with the October 16<sup>th</sup> ExacNews (issue 2007-23). If you misplaced this or did not receive one, contact the Customer Support Department. This ExacNews issue is also available on the Exactax web site, **[exactax.com](http://exactax.com)**. Select *Support/Bulletins*.

### **RDE Workshops**

There are still some seats available for the RDE workshops being held on November 9, 12 and 16 at our Anaheim location. Call Customer Support to make your reservation.

### **Change to Large Mailing Envelopes**

The U.S. Post Office has revised its method of determining postage, now taking into account several factors including weight, size, destination and orientation. As a result, the current portrait format, (vertical), of the large envelopes may incur higher postage than the same package mailed using a landscape envelope. Beginning in January, Exactax will be changing to landscape envelopes and slip sheets for all 2007 returns.

**Note:** The landscape option is not available for 2004, 2005 or 2006 returns.

**Tax Organizers:** The landscape format will also apply to the 2007 Tax Organizer slip sheets. An option has been added to the Tax Organizer Order Form to request portrait slip sheets instead.

## E-file Questionnaire

The 2007 E-file Questionnaire is included with this bulletin. If you are planning to e-file through Exactax for the first time or have changes to your EFIN currently on file with Exactax, complete the questionnaire and return it as soon as possible.

## Amending 2004, 2005 and 2006 Returns

When amending a 2004, 2005 or 2006 1040 return by rerun, you need to request a check in Box 2 on Form *Amend* [95A] and all of the information from the previous return will be recalled. Enter the explanation for amending and other changes to the return as you normally would. To amend a state return, request a check on that state's amended form in the box labeled '*Transfer original information*'. For example, to amend a California return, check zip box 1 on Form CAAmend [CA35]. If there are more than 30 changes in all, you must make all changes on the input forms, including the amended forms, and resubmit them for processing as an initial return.

To amend returns not previously processed through Exactax, you must complete all of the applicable fields on Form *Amend*. Then complete the other input forms, as needed, to produce the new corrected return.

## Hold for Pick-Up

If you plan to pick up a return that would otherwise be packed for shipping, please call before 3:30 PM and let our Shipping Department know so they can set aside your returns. This will make the pick-up process more efficient for everyone. There is never a charge for returns marked as "Hold for pick-up" at Exactax. However, returns that were not initially marked as "Hold for pick-up" on Form PI and are subsequently picked-up will still be billed the shipping charge, if any, assigned to that return.

## Billing Queries and Reminders

When requesting adjustments to your billing, state the problem in the comment section of your remittance and include it 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. until the account is current. → C.O.D. status will delay shipment of proforma and organizers!*



# 2007 e-file

## Questionnaire

- Are you filing electronically for the **FIRST TIME** with ExacTax?
- Have you filed a **REVISED Form 8633** since last year? *or*
- Has any of the information below changed?

If any of the above is true, please complete the following information and return this form to ExacTax by mail or FAX by December 31, 2007 *and* attach copies of your *Electronic Filing* letters of acceptance from the IRS and/or State Departments if applicable.

**Note:** Each type of return to be e-filed through ExacTax, (1040, 1041, 1065 and 1120), must be specified on your application to the IRS.

<b>ExacTax Account Number:</b>
<b>Electronic Filer ID Number (EFIN):</b>
<b>Firm Name:</b>
<b>Address:</b>
<b>City/State/Zip:</b>
<b>Contact Name for Electronic Filing:</b>
<b>Phone Number: E-mail Address:</b>
<b>FAX Number:</b> <input type="checkbox"/> <b>Call first before starting FAX</b>
<b>Special Instructions:</b>
<b>Processing Method: (Check all that apply).</b> <input type="checkbox"/> <b>Service Bureau</b> <input type="checkbox"/> <b>Remote Data Entry</b>
<b>Comments:</b>

**ATTN: Electronic Filing Department**  
**ExacTax, Inc.**  
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