

January 26, 2009

Issue 2009-03

## **ExacNews**

### **ExacTax Client:**

2008 tax processing is now up and running. All available proforma and starter kits have been shipped. The remaining state programs are expected to be released this week. Proforma and supplies for those products will ship by the week of February 9<sup>th</sup>.

### **Starter Kits and Manuals**

Starter Kits for California 1065 and 1120 will be included with the next state proforma shipment. Instruction manuals for the business system are scheduled for the week of February 16<sup>th</sup>. The 1040 instruction manual is scheduled to be shipped next week.

### **Courier Service**

Courier service officially begins on Monday, February 2<sup>nd</sup> with a trial run on Friday, January 30<sup>th</sup>. If you are interested in signing up, please contact our Courier Service Manager, Barbara Hammond, at (800) 352-3638, extension 218, to see if this service is available in your area.

### **ExacPay Credit Card Authorization**

The ExacPay Credit Card Authorization Form was included with the previous issue of ExacNews. If you are currently participating and have changes to make, please return this form as soon as possible.

### **Social Security Income Input**

The 2008 input for Social Security and Railroad Retirement benefits has been relocated to the bottom of Form Income [22A] and the format has changed slightly. There are two separate sets of SS/RRTA input for entering the amounts for the taxpayer and spouse. If you had entries for this income last year, the 'T' or 'S' indicator will be proformaed. When you are entering amounts in this area for the first time, it does not matter if taxpayer or spouse is entered first, as long as you identify each with the 'T' or 'S'. When you call Customer Support regarding this area, refer to 'SSA-1099' and not 'Income'.

### **Office Hours**


Office hours are currently 8:30 AM – 5:00 PM Pacific Time.



Beginning February 2<sup>nd</sup> the extended hours will be 8:00 AM – 7:00 PM Pacific Time.

Saturday office hours will commence February 7<sup>th</sup> from 8:30 – 5:00 Pacific Time.

### **RDE Software Releases**


All RDE software has been shipped. By now you should have also received a shipment from Creative Solutions for UltraTax version 2008.3.0. Additional interim releases, including electronic filing and various state products, are available only by downloading

updates after installing version 2008.3. Check for updates available on your *Home Page* by pressing the *Home Page* icon  on the right-hand side of the tool bar.

Look for the item   Updates awaiting retrieval via CS Connect [Retrieve updates] to quickly tell if any updates are available.

**Important:** DO NOT call Creative Solutions for support or for inquiries on your shipment status. As an RDE user all of your support must come through ExactTax.

If you have not received the latest CD and would like to download it from the internet, (only recommended if you have a high speed connection such as DSL or cable modem), it will take approximately 15 – 20 minutes.

- Start 2008 UltraTax and from the main menu, select *Help \ On the Web \ Product Support and Service*. This will launch your browser to the Creative Solutions support site.
- Click on *My Downloads* and you will receive a Log In screen.
- Enter the Email address: [exactax@exactax.com](mailto:exactax@exactax.com)
- Enter the password (must be all capitals) **EXACTAXRDE**
- Click on *Download the latest version of UltraTax CS*
- Follow the instructions. If you use the Download Manager option it will give you an option to *Launch when done* so that the install will begin automatically when the download has completed. If you do not use this option, then note the location where you are saving the download file so that you can manually execute it when the download is complete.
- When the download is complete check for updates on the *Home Page*  .

### Input Form Print Error

When 1040 Form 2106 [72] was printed the fields for entering the business miles were inadvertently shaded. Please disregard this shading and fill in the applicable business miles or no business expense can be computed.

★ Tax Method (✓one only):	
<input type="checkbox"/>	Optimize (1st year only)
<input type="checkbox"/>	Standard (Default after 1st year)
<input type="checkbox"/>	Actual
Vehicle Use	
Total miles	
Commuting miles	
Bus miles 01.01-06/30	
07.01-12/31	
Avg total trip combine	
Business use %	
Business miles X .505	
Business miles X .585	
Other Information	
Value of employer provided vehicle	
Other	
Go Zone/JGTRRA (note)	

◀ Always complete the business mileage on Form 2106 [72].

INDIVIDUAL