

March 30, 2009

Issue 2009-12

## **ExacNews**

### **ExacTax Client:**

This will probably be the last issue of ExacNews that you will receive before April 15<sup>th</sup>. ExacTax telephone support and return pick-up will be available on Sunday, April 5<sup>th</sup> and 12<sup>th</sup>, from 9:00 AM to 3:00 PM, to assist you with your questions and reruns. A list of cut-off dates and processing schedule for the final week is included with this issue. All prior ExacNews issues are available on the ExacTax web site. Go to [www.exactax.com](http://www.exactax.com), click on *Support* and then *Bulletins*.


### **Expedited Returns**

Expedited handling is for processing the return only. Shipping back to you is always your regular method unless you specify otherwise. Be sure to review the special shipping options on Form PI to ensure timely delivery. For more details see the previous issue of ExacNews.

### **Billing Queries and Reminders**

When requesting adjustments to your billing, state the reason in the comment section of your remittance and submit it with your payment. Any problems or questions regarding billing 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.*

*Accounts using Courier Service will have all shipments held until the account is current.*

*All other C.O.D. accounts will be shipped UPS C.O.D. until the account is current.*

### **Automatic 1040 Extensions**

ExacTax will automatically provide federal Form 4868 extension forms, (name, address and SSN only), for all 1040 proformas that have not been processed by the end of the business day on April 1<sup>st</sup>. There is no charge for this service.

### **Electronic Filing Cut-Off**

For electronically filed returns to be “timely filed”, they must be transmitted to the IRS and/or to the FTB on or before April 15, 2009 and **accepted** by the IRS and/or FTB on or before April 20, 2009. Therefore, ExacTax must receive electronic filing authorization by **3:00 P.M. (PT)** on April 15, 2009.

If a return is filed by April 15<sup>th</sup> and is rejected, the re-transmission of corrected, timely filed **rejected** returns must be authorized to ExacTax by **3:00 P.M. (PT)** on Monday, April 20, 2009. If you have not received ACKS for all returns that have been transmitted by April 15, please call Customer Service at 800-254-2244 by April 16 to confirm the status.

Electronic filing of extensions is not available. Extension Form 4868, 7004 and/or state extensions **must be** filed on paper.

Returns for which a paper extension has been filed may still be filed electronically with the IRS and/or the FTB until October 15, 2009 and must be accepted by the IRS and/or the FTB on or before October 20, 2009.

**Note:** A report of e-file returns that had not yet been transmitted as of March 26 was sent out on March 27<sup>th</sup>. If you have not received an ACK for an e-file return then it should be considered as not filed. Call Customer Support for the most current status of any return in question or for a re-print of the ACK.

### **Post April 15<sup>th</sup> Schedule**

Exactax will be open on April 16<sup>th</sup> and closed on Friday, April 17 through Monday, April 20. A transmission will be made for corrected e-file returns on April 20 (see above). Regular hours will resume on Tuesday, April 21, 8:30 - 5:00.

### **E-file Requires Vehicle Miles**

Whenever an auto and truck expense is present on Form C-2 [**28B**], Rent [**31**], Farm [**36A**] or 4835 [**38A**], e-file requires that the vehicle mileage must also be entered. To do this you must complete an Input Form [**51**] with the vehicle and mileage information. If an entry is only made for total car and truck expenses without the auto detail, the return will not qualify for e-file.



# Southern California

## *2009 Cut-Off Dates and Processing Schedule*

To ensure that your returns are delivered to your office or are available for pick-up at the processing center by Wednesday, April 15<sup>th</sup>, returns must be in the Anaheim office on or before the dates and times listed below.

All returns to be held for pick-up at the Anaheim office must be picked up by 4:45 p.m. on Wednesday, April 15<sup>th</sup>.

### *Service Bureau (Batch) Returns*

#### **Returns Shipped to you via:**

#### **Must be in Anaheim by:**

Returns to be shipped via U.S. Mail or UPS .....	2:30 p.m. Thursday, April 9
Telephone Reruns to be shipped via U.S. Mail or UPS.....	11:00 a.m. Saturday, April 11
Returns to be delivered by Courier.....	Saturday, April 11
Telephone Reruns to be delivered by Courier .....	12:00 noon Sunday, April 12
Returns marked <b>“Hold for Pick-Up”</b> * at our Anaheim Center .....	12:00 noon. Monday, April 13
Telephone Reruns marked <b>“Hold for Pick-Up”</b> * at our Anaheim Center .....	12:00 p.m. Tuesday, April 14

\*Returns marked **“Hold for Pick-Up”** can be picked up after 12:00 noon on Wednesday, April 15, 2009.

**Note: Special handling options “Hold for Pick-Up” and/or “Expedite” must be marked on Form PI and on the outside of the envelope when submitted for the fastest processing.**

### *Remote Data Entry (RDE) Returns*

#### **Returns Shipped to you via:**

#### **Must be in Anaheim by:**

Returns and reruns to be shipped via U.S. Mail or UPS.....	11:00 a.m. Saturday, April 11
Returns and reruns to be delivered by Courier .....	12:00 noon Sunday, April 12
Returns and reruns marked <b>“Hold for Pick-Up”</b> * at our Anaheim Center .....	12:00 noon Tuesday, April 14

\*Returns marked **“Hold for Pick-Up”** can be picked up after 12:00 noon on Wednesday, April 15, 2009.

**Note: Special handling option “Hold for Pick-Up” must be entered on Form PI when transmitted for processing.**

Please note that our Anaheim Center will be closed on Friday, April 17 through Monday April 20. We will resume our normal business hours of 8:30 a.m. to 5:00 p.m. on Tuesday, April 21.



# Northern California and All Other Areas

## 2009 Cut-Off Dates and Processing Schedule

To ensure that your returns are delivered to your office by Wednesday, April 15<sup>th</sup>, returns must be in the Anaheim office on or before the dates and times listed below.

### *Service Bureau (Batch) Returns*

<b>Returns Shipped to you via:</b>	<b>Must be in Anaheim by:</b>
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Returns to be shipped via U.S. Mail or UPS .....	2:30 p.m. Wednesday, April 8
Telephone Reruns to be shipped via U.S. Mail or UPS.....	11:00 a.m. Friday, April 10
Returns to be delivered by Courier .....	Friday, April 10
Telephone Reruns to be delivered by Courier .....	11:00 a.m. Saturday, April 11

*Note: Special handling option "Expedite" must be marked on Form PI and on the outside of the envelope when submitted for the fastest processing.*

### *Remote Data Entry (RDE) Returns*

<b>Returns Shipped to you via:</b>	<b>Must be in Anaheim by:</b>
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Returns and reruns to be shipped via U.S. Mail or UPS.....	11:00 a.m. Friday, April 10
Returns and reruns to be delivered by Courier .....	12:00 noon Saturday, April 11

Please note that our Anaheim Center will be closed on Friday, April 17 through Monday April 20. We will resume our normal business hours of 8:30 a.m. to 5:00 p.m. on Tuesday, April 21.