

September 16, 2009

Issue 2009-20

ExacNews

ExacTax Client:

The October deadline will be here in less than a month! Please review your supplies and order what you may need. Remember, in a pinch you can copy a form, other than Form PI, from your instruction manual. *Never copy Form PI or any input forms with proforma data.*

Regular Office Hours

ExacTax is now open from 8:30 to 5:00, Pacific Time, Monday through Friday.

Electronic Filing

A list will be sent to each account showing any qualified e-file returns that have processed but have not yet been authorized for transmission. All requests for electronic filing must be received by ExacTax no later than Wednesday, October 14th. Returns that are e-filed timely but are rejected have until Tuesday, October 20th to make corrections and re-transmit.

Remember: For each e-file return, you must receive an acknowledgment from each taxing agency, or that return will not be considered as having been filed.

Tax Organizers

The Tax Organizer Order Forms will be mailed out at the end of October. All 1040 clients processed by October 23th will be listed. You may add and delete Organizer orders from the list. If the list is not returned by the deadline, ExacTax will print Tax Organizers based on the pre-orders as shown on the list. Late requests for Tax Organizers will be processed in the third week of December.

→ Tax Organizers are only processed for accounts that have renewed for 2009. Be sure that you renew for 2009 before you send in your order.

Client Labels

A set of client labels will be mailed in late November, at no charge, to accounts renewed by November 18th. The set will contain two labels for each 1040 client processed by November 18th, 2009. Late renewals will receive labels in January. Additional chargeable sets may be ordered at any time.

Workshop Schedules

The 2009 ExacTax Update Workshops are currently being scheduled and will be held in early January. Look for the registration form in one of the next ExacNews issues.

Batch Renewals

2009 batch renewal forms were mailed out several weeks ago. Early renewal discounts apply to registrations received by September 30th. If you have not received your batch renewal form please contact Customer Support.



Prior Year Returns on CD

2008 returns on CD will be available beginning in February 2010. Order forms for requesting 2008 returns on CD will be sent out at the end of December.

Expedite Service

You must enter a check on Form PI, in zip box **3** to receive Expedite Service on a Business, Fiduciary or Individual return. ExacTax will not check the box for you. Expedite Service means that a return will be processed and ready for shipping or pick-up within 24 business hours from the time it is received at our Anaheim office. The handling fee is \$23.00 for each Individual and Fiduciary Return and \$33.00 for a Business Return.

Expedite returns will be shipped via your normal method of shipping unless you request *Special Handling*. See Box 2 on Form PI for the various shipping options such as UPS Next Day.

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!*