

ExacNews

Exactax Client:

Our summer e-file workshops for Northern California are beginning this week and so far there has been strong interest. Workshops for Southern California begin next week on June 22. Anaheim workshops #202 on June 23 and #204 on July 14 are now full but there are still openings for #203 in San Diego on June 24 and for #205 in Anaheim on August 11.

Note: If you are unable to attend a workshop and would like a workshop packet, these will be available on request after the workshops conclude.

Important: The IRS just announced a phase-in of the mandatory e-file requirement over two years. See details on the next page.

Operating Hours

Regular hours are 8:30 – 5:00, Monday through Thursday.

▶ **Exactax will be closed on Fridays through September 17th.**

Exactax will also be closed on July 5th.

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 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 ONE shipment, UPS C.O.D., for the balance past due. Any returns processed after that shipment will be held until monies are received from UPS and account is current.*

If you do not want shipments sent to you UPS C.O.D., contact Customer Service to place your account on HOLD until you bring your balance current.

● *E-file transmissions will be held for accounts on C.O.D. until the balance is current.*

Remote Data Entry (RDE) Renewals

Renewal forms for RDE accounts were mailed out in the last week of May. If you have not received your RDE renewal, please contact Customer Support.



Save \$75.00 on your RDE renewal when you renew by July 15, 2010!

Batch Renewals

Batch renewal forms will be mailed during the August/September timeframe.

Many Tax Return Preparers Required to Use IRS e-file Beginning in 2011


Congress recently approved a federal e-file mandate for tax return preparers, based on recommendations from the IRS, the Treasury Inspector General for Tax Administration and the Electronic Tax Administration Advisory Council.

The requirement will be phased in over two years. As a result of the new rules, preparers will be required to start using IRS e-file beginning:

- **January 1, 2011** — for those of you who anticipate preparing **100 or more** federal individual or trust tax returns during the year; or
- **January 1, 2012** — for those of you who anticipate preparing **11 or more** federal individual or trust tax returns during the year.

RDE – Amending a 1040 Return

When amending an RDE return that was previously processed, the prior amounts will only populate 1040 Screen Amend when zip 2 is checked if they have been stored. The system only stores the original amounts for recall when the return has been Print Previewed.

Note: The Print Preview function is only available on proforma (download) files that Exactax has provided. Press the Print Preview button on the toolbar **before** making any input changes to save the original amounts.  ← (Print Preview button)

If Print Preview is not available then all applicable fields on Screen Amend (and the state equivalent, if applicable) must be manually entered.

California Forms 9000H and 9000R, Homeowner Assistance Claim and Renter Assistance Claim

California Form 9000H, Homeowner Assistance Claim, and Form 9000R, Renter Assistance Claim are normally available at this time of the year. However, due to the California budget shortfall, these credits are unavailable until next year (unless, of course, they are suspended again.)