



# T A X W A R E

N e w s - N o v e m b e r 2 0 1 7



## C o n t e n t s

- ▶ Proforma
- ▶ New Website Launch
- ▶ Wintax Next Generation
- ▶ Renewing an ITIN
- ▶ Release Schedule
- ▶ Bank Enrollment
- ▶ New Client Webinar
- ▶ Annual Seminar

We have been hard at work since the end of the 2016 filing season. Many enhancements and improvements have been made. Our website has gone through a major redesign. Many new features have been added including optional login pages and other security upgrades. We are excited about our new Wintax - 1040 NextGen system. We're now making excellent progress on the 2017 programs and anticipate an on-time release date.

### Proforma Organizer

The Proforma Organizer has been updated for the 2017 tax season. It is available to download on our website at the provided link below. If you are currently registered through our website and we have your current e-mail address, you should have received an e-mail notification with a link to this newsletter. If you didn't receive an e-mail notification, please go to our website and register. This also enables you to use all of the additional support tools available to you on our website.

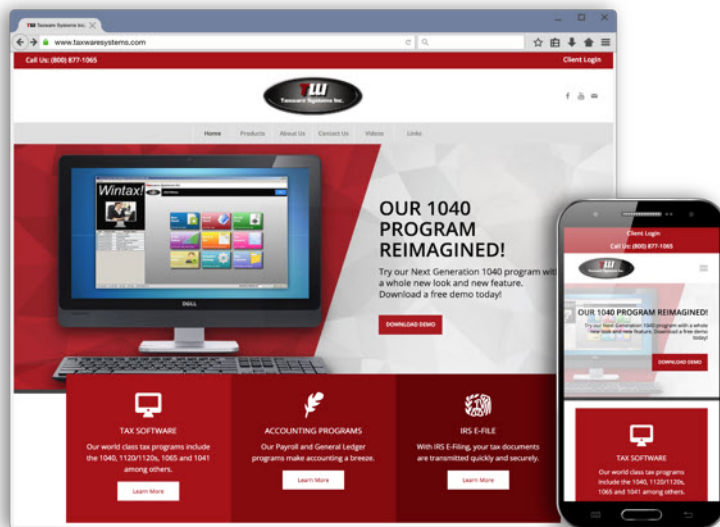
The proforma download link is:

[www.taxwaresystems.com/ftp/wintax/17proforma.exe](http://www.taxwaresystems.com/ftp/wintax/17proforma.exe)

T A X W A R E

N e w s - N o v e m b e r 2 0 1 7

www.taxwaresystems.com

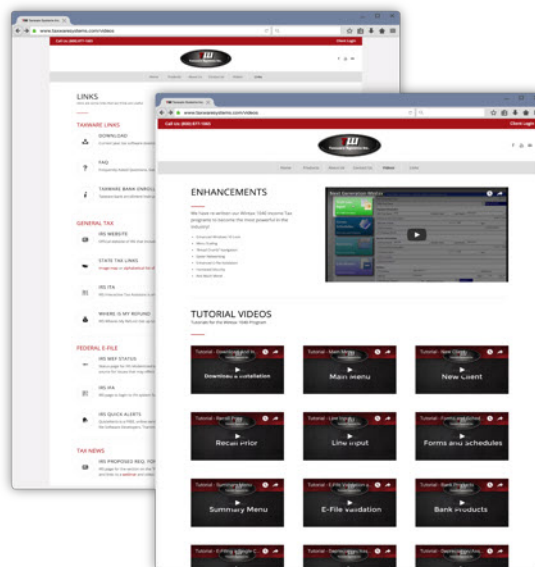


At the end of September, we launched the new Taxware Systems website that not only provides a new look, but a better user experience. We wanted the new website to be easy to use on mobile devices, give our clients all the information they need at their fingertips, and have a cohesive brand tone. We are very excited to share it with you!

The new website is now compatible on mobile devices, this makes our website more convenient to use on the go wherever you are. We have created a consistent navigation, so no matter what page you are visiting, all the buttons you need are in the same place on mobile and for the desktop.

We have added several new tutorials to the video section of the website that may help answer some of the questions you might have about the Wintax program. This includes a video showcasing our new Wintax NextGen program and its new features. Make sure you check out that video if you have not already. We plan on adding even more tutorials in the future, be on the lookout for them!

There is an updated Links section on the website. This is where we like to share links we feel are helpful throughout the tax season. This section is also where you can find what banks we have partnered with and support our Wintax program.



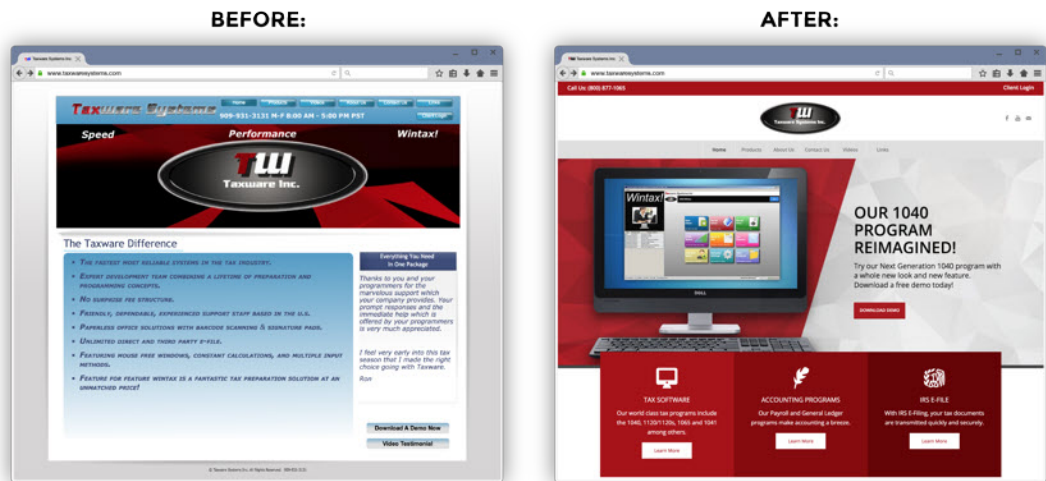


# T A X W A R E

N e w s - N o v e m b e r 2 0 1 7

## www.taxwaresystems.com - Continued

The brand tone or identity is now universal across the platform. The new Taxware Systems website logo matches our other marketing materials and brand equity. The blue color of our old website was not consistent with our booth and other marketing pieces; to fix this we incorporated the red, our core brand color and some new textures to bring everything together.



There are a few pages that are still under construction and will be phased in as they are finished. Many of those pages are in the active clients section where programs can be downloaded, bulletins viewed, and messages posted. While those pages are being worked on you may be redirected to an area of the old website. We plan on having those pages built soon.

We hope you enjoy the new website as much as we do! When you get the chance please go take a look, we would love to hear your feedback.



# T A X W A R E

N e w s - N o v e m b e r 2 0 1 7

## 2017 tax season will most likely be the last year we support the Legacy Wintax System.

We are really excited about the new development and level of testing that the new “Wintax 1040 Next Generation” is receiving. The rich features, look, and functionality raise the bar on professional tax software.

As we migrate different forms, schedules, and states into the new system we will continue to use pieces of the “Legacy 1040” system, however this upcoming 2017 tax season will probably be the last year that we will support the Legacy platform.

If you haven’t had a chance to check out the new Wintax system we would encourage you to load it up and take a look. We also have a video on our website that will give you an overview of the new program <https://youtu.be/xszthPHx81s>

This Summer we are working on updating most of our tutorial videos so that they are rooted in the new Wintax Next Generation platforms. These videos will be available on our videos web page in about a month. We are updating our front end webpages and those videos are slated to be included in that release.

## Wintax Next Generation - 1040



### Features

- Enhanced Windows 10
- Native PDF Print
- User Interface Scaling
- “Bread Crumb” Navigation
- Easier Networking
- Enhanced E-File Validation
- Enhanced Client Selection and Filters
- Expanded Client Information
- Live View Forms Preview
- Expanded E-File Tracking
- Increased Security

In our November 2016 newsletter we included an article regarding the new system and its features. If you did not get a chance to read about some of the new features here is a link to that newsletter

<http://www.taxwaresystems.com/bulletins/NewsletterNov2016.pdf>



# T A X W A R E

## N e w s - N o v e m b e r 2 0 1 7

### Renewing An ITIN: A Guide

Do your clients have ITINs, or Individual Taxpayer Identification Numbers? The IRS issues an ITIN to those who need to file a tax return or report to the IRS, but who are not eligible for a social security number, and some of those ITINs expire at the end of 2017. If your client needs to renew an ITIN, complete an application this fall to avoid delays.

The following list includes what forms they will need to renew the ITIN:

**Form W-7:** The Form W-7 is the application for the IRS Individual Taxpayer Identification Number. The client **must have** identification documents with the form, but they do not need a completed tax return.

**Proof of Foreign Status and Identity:** Many forms fulfill this requirement, including:

- Passport (This can be a stand-alone for dependents with a U.S. date of entry. Otherwise, other identification from this list is required.)
- National ID Card
- Visa
- U.S. Driver's License or Foreign Driver's License
- Birth Certificate (Required for dependents under 18)

Other documents are eligible to show proof of foreign status as well. For a full list, please visit [www.irs.gov](http://www.irs.gov).

**Note: Only original documents or certified copies are accepted.**

**Dependent Requirements:** If a client needs to renew an ITIN, they can renew their family at the same time. For dependents from countries other than Mexico or Canada or U.S. military members overseas, a passport with a U.S. date of entry will work for identification. Along with the passport, dependent applications require:

- U.S. medical records for dependents under age 6 or U.S. school records for dependents under age 18.
- U.S. school records for dependents age 18 or over or a rental statement, utility bill or bank statement with the applicant's name and U.S. address.

To claim certain credits and ensure a timely refund, make sure the client renews their ITIN before filing taxes. For more information, please visit [www.irs.gov](http://www.irs.gov).





# T A X W A R E

N e w s - N o v e m b e r 2 0 1 7

## Release Schedule

**Release Schedule** The program shipping schedule will be approximately the same as last year. If you would like to be included in the first shipment, make sure your renewal payment is submitted well before these dates.

Proforma organizer available now.

Winpay/W2/1099 Accumulator 12-15-2017. (These programs will be downloaded from our website this year.)

Wintax and other income tax programs starting 12-26-17.

**Tax Season Hours** The telephone hours will be the same as in prior years, running 7 AM to 6 PM (PST) Monday through Friday with a half day Saturday (8 AM-12 PM) support shift.

## Bank Enrollment

It's that time of year again! If you work with bank products the banks require enrollment annually. If you are planning on working with bank products we would encourage you to enroll early and well before the upcoming e-filing season starts. The banks do take some time to review your applications prior to acceptance and is at the discretion of the bank.

We are pleased to announce that your annual Bank Enrollment Applications can now be submitted within Taxware's 2016 Wintax programs if using Refund Advantage or Santa Barbara bank. We are excited about this as it will be a much cleaner integration between Wintax, the Banks, and any fees you are collecting.

If we have your current email on file you should have received an email regarding this with an instructions link. If you did not receive this email then please check your spam folder or contact Taxware so we have your correct email on file as well as give you your initial login password.

To learn more check out our bank enrollment instructions web page at:

[www.taxwaresystems.com/bank-enrollment-instructions](http://www.taxwaresystems.com/bank-enrollment-instructions)

The image shows two screenshots of the Taxware Bank Enrollment interface. The left screenshot displays the 'Current Bank Settings' and 'Bank Enrollment' sections. The right screenshot shows the 'Bank Enrollment' log-in form with a status table.

**Current Bank Settings**

- [01] EFIN: 333123
- [02] Bank Product Provider: Refund Advantage
- Refund Advantage Bank program selected
- Fee Advantage: .00
- Transmitter Fee: .00
- Service Bureau Fee: .00
- Card Program: ERO not eligible.
- ERO is registered to offer Advance Refund
- [03] Prompt to Print 7216 forms on Entry of Bank Application Menu:  Yes

**Bank Enrollment**

- [04] EFIN: 333123
- [05] Taxware Client ID: [input field]
- [06] Password: [input field]
- Enter Enrollment Menu: Bank Product Enrollment

**Bank Enrollment Log In Info**

- [01] EFIN: 333123
- [02] Taxware Client ID: 555-25
- [03] Password: Password
- [04] Master EFIN (Only needed if Service Bureau fees are collected): [input field]
- [05] Bank Selected: Refund Advantage

**Status**

Enrollment Process	Incomplete
Status from Bank	Active
Card Status	ERO not eligible.
Advance Loan Status	No
Response Code	



# T A X W A R E

## N e w s - N o v e m b e r 2 0 1 7

### N e w C l i e n t W e b i n a r

We encourage everyone, but especially new clients to attend our live annual seminar talked about below. We understand that travel can be difficult so if you can't make it to our seminar we are hosting some webinars hosted through GoToMeeting. In these webinars we will cover basic setup and tax return flow and preparation.

Space is limited so if you are interested in attending please email us your name, Taxware client ID, and email address for each computer that will be logging into the webinar at [info@taxwaresystems.com](mailto:info@taxwaresystems.com)

Add "New Client Webinar" in the subject line.

We of course invite all of our clients to attend but the agenda is geared for new clients or clients that will be using Wintax - NextGen for the first time.

The first webinar is scheduled for December 6th 9-11am PST.

### A n n u a l S e m i n a r

It's that time of year again! Taxware Systems is holding their annual seminar where you can learn about how to use the program, changes in tax law and other important information for the upcoming tax season. We encourage you to attend, especially if you are a new client.

The seminar will be held at the **Azure Hotel and Suites Ontario Convention Center Wednesday January 3rd from 9 AM - 4 PM and Thursday, January 4th from 9 AM -12 PM**

**Register using the link below:**

<http://www.taxwaresystems.com/seminar/>

For hotel reservations, please reach out to [Azure](#) Hotel & Suites through their website or by phone.

On a final note, the IRS will shut down their E-file production of individual returns Saturday, Nov 18. They do this to prepare their systems for the new tax season. Our A2A system will stop accepting individual returns at that time. The date to shut down business returns has not yet been released, but it is usually sometime in December.



# T A X W A R E

## N e w s - N o v e m b e r 2 0 1 7



### **Support Tips and Tools**

By Andrew Ericson

Navigating tax software can be daunting at times. Taxware support is here to help with tips and tools to turn tedious returns into yesterday's completed pile! Our year round support staff is available to assist you with questions involving our software, but if you're working late or trudging through the weekend, these helpful tips should see you through:

**Patch file won't apply:** You may experience an issue where you tell the computer to apply a patch file to your program and nothing happens! You open the program and the same thing repeats itself. This is most common in computers with newer versions of the Windows Operating System (Windows 7, Windows 8.1, and Windows 10). To get around this, right-click the icon you use to launch the program and choose the option 'Run as Administrator'. This will provide the program the elevated privileges it needs to apply the patch.

**Best call times:** During tax season, no one has time to wait. Be sure to take advantage of our extended hours (7 AM to 6 PM Monday – Friday PST) during tax season. Although call volume fluctuates throughout the day, the lowest volume periods are early morning and later evening. Don't forget that we are also open Saturday from 8 AM to 12 PM during the tax season as well. This is the best time to get those quick questions answered.

**Use all the tools available to you:** Taxware offers many support options in addition to telephone support. These options include dedicated support e-mail, message boards, and comprehensive self-help tools available on our website and built-in to the program.

Support e-mail: Sending an e-mail to [support@taxwaresystems.com](mailto:support@taxwaresystems.com) is a great way to get your questions answered by a support technician without having to be tied up on a phone call. Your e-mail is automatically entered into our system and assigned a ticket number for easy reference and tracking.

Message Boards: Taxware provides community message boards for users to communicate and find answers. Although these boards are monitored by Taxware support technicians, they are mainly intended to be used for communication between preparers. Questions and advice can be given or found 24/7.

Self-help tools: For those that need immediate help or prefer to solve the problem on their own, there are a variety of self-help tools available. These can be found on the 'videos' section of the Taxware website, or by clicking 'Training' on the Master Tax Menu. Also included in each program is a comprehensive 'Help' menu that can answer many questions. In addition to this, the 1040 program also has a built-in F.A.Q. that answers **many** questions posed to the support staff each tax season. We definitely recommend checking out these options even before picking up the phone.

**Fast Support:** When all else fails, sometimes it is easier to be helped with a hands-on approach. Technology can make this possible. With your permission, a Taxware support technician can remotely connect to your computer to assist you with your program questions or difficulties. Often times, something that can be difficult to explain can be solved in mere moments by allowing a technician to see the problem first-hand and assist you in resolving it.



We are fortunate to be able to work with great clients that know how to do tax returns. Working with you we are able to provide excellent support. We added a lot of great new clients this year that needed a little extra start up help. That combined with the IRS late start brought the call back times at the beginning and ending of the tax season up some. Except for those days our telephone response time was zero to five minutes which is our overall support goal. We look forward to working with you again this upcoming tax season.