T A X W A R E

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C o n t e n t s

We have been hard at work since the end of the 2015 filing season. Many enhancements and improvements have been made. We are excited about our new Wintax - 1040 system. We're now making excellent progress on the 2016 programs and anticipate an on-time release date.

We look forward to another successful filing season!

Proforma Organizer

The Proforma Organizer has been updated for the 2016 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/16proforma.exe

R e f e r A F r i e n d

Don't forget our customer referral bonus: Each referral from you that results in a new customer for Taxware will give you $250 off of your next year's renewal.

TAXWARE

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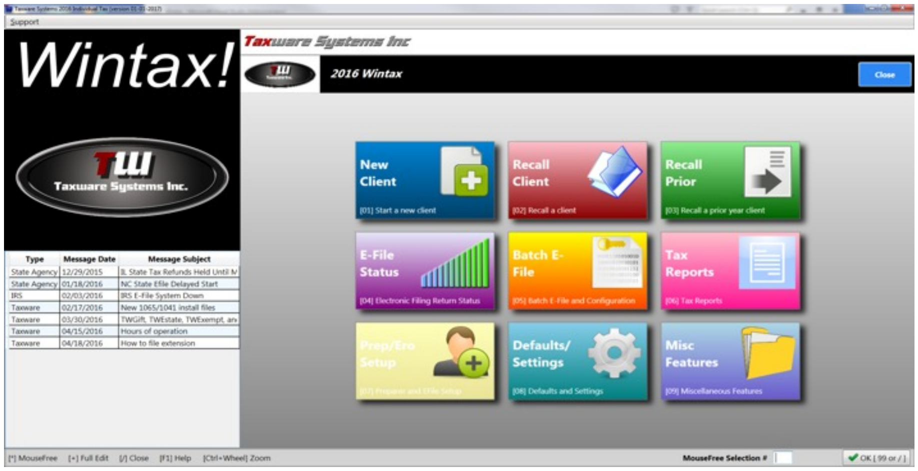
Wintax - 1040

We have had a busy summer! We have added a lot of fantastic capabilities to the Income Tax programs. We appreciate your ideas and partnership continuing to help Wintax be the best in the industry. We have posted a video that shows you the great enhancements that have been made to our new next generation Wintax - 1040 program. https://youtu.be/xszthPHx81s

Taking advantage of some of the latest programming tools available, we have rewritten our Wintax - 1040 Income Tax programs.

We wanted to develop dynamic systems with a more user-friendly experience but keep our existing tax return flow so there wouldn't be a learning curve.



We believe we have hit the mark with this new Wintax program and are excited for its launch!

The new programs have the same overall features, functionality, and great flow as the old programs. Don't worry, we didn't take any features out, but we made some great additions to them that we know you will appreciate. Some of the new key features that were added include:

- **Enhanced Windows 10** user interface, fully maximized screen and overall more user-friendly experience. Defaults and Settings have been moved to their own page. For most clients, Taxware's standard defaults are adequate and typically do not require adjustments.

- **Native print** Printing is even faster.

- **User interface scaling** This can be done on any page by CTRL mousewheel up or down. You can also go to the Defaults and Settings page and use the scaling slider. The scaler will remember whatever it was set to last when you exit the program.

- **Easier networking** Available networked drop down as well as networking filter. The network name is now part of the operating system's client storage and gets ported into the client and e-file databases. This means you can easily switch to another network client's settings, and that you can also filter clients based on your network ID. If you are not networking, simply uncheck the "Enable networking user filter" selection and the "User Filter" goes away. Tax returns' network ID gets set during new client or prior year recall but can be reassigned in the print configuration menu.

- **"Bread crumb" navigation** is awesome! Now you can know where you are in the tax return all the time. What makes this feature really fantastic is that clicking the blue titles can also be used to go straight to a specific page.

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Wintax Continued

- **E-file Validation** is now native to the new program. The internal and IRS Schema validation for the federal takes place during the load of the validator. We also have color coding of the XML, copy and paste functionality, and search XML utilities.

- E-file tracker has a new **Station ID filter**. If networking computers or station ID EROs that intend to share the program, a station ID can be entered and the new e-file tracker will filter their tax returns.

There are too many fun things to talk about regarding the new program, but I'll talk about a few of the highlights.

Note: We are not discontinuing our fantastic current legacy 1040 program, so if you are more comfortable using the legacy program it is also being added to and enhanced.

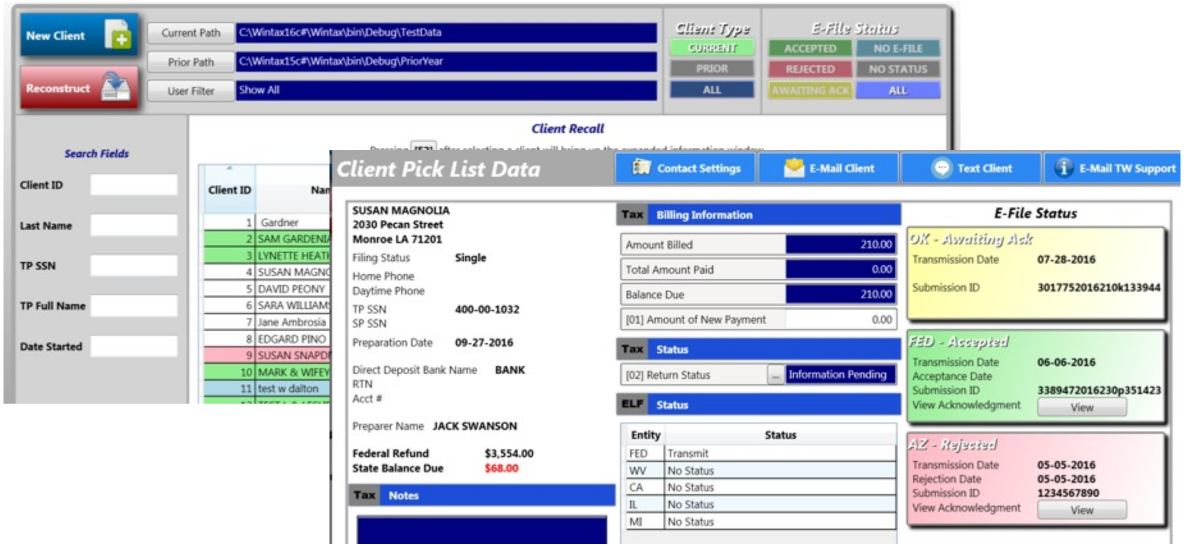
Client Selection Grid

We are really excited about the new, enhanced recall client page. On this page, clients can filter the tax returns to show only tax returns for the selected filter by clicking the filter buttons. The search options located to the left will search the filtered dataset. This should make finding and working with your clients a lot easier and faster.

Also from this page, the new client wizard can be accessed to start a return by selecting the new client button located in the tool bar.

For clients that have been recalled into the current year, expanded client information can be accessed by searching for the client and hitting the F2 key or clicking the F2 button.

This page provides a quick snapshot of the tax return. Client basic information, direct deposit information, amounts refunded or owed, amounts billed and owed, and a quick summary of the electronic filing status of the federal and state returns. For electronically filed returns, acknowledgement files can be printed right from this expanded information page.



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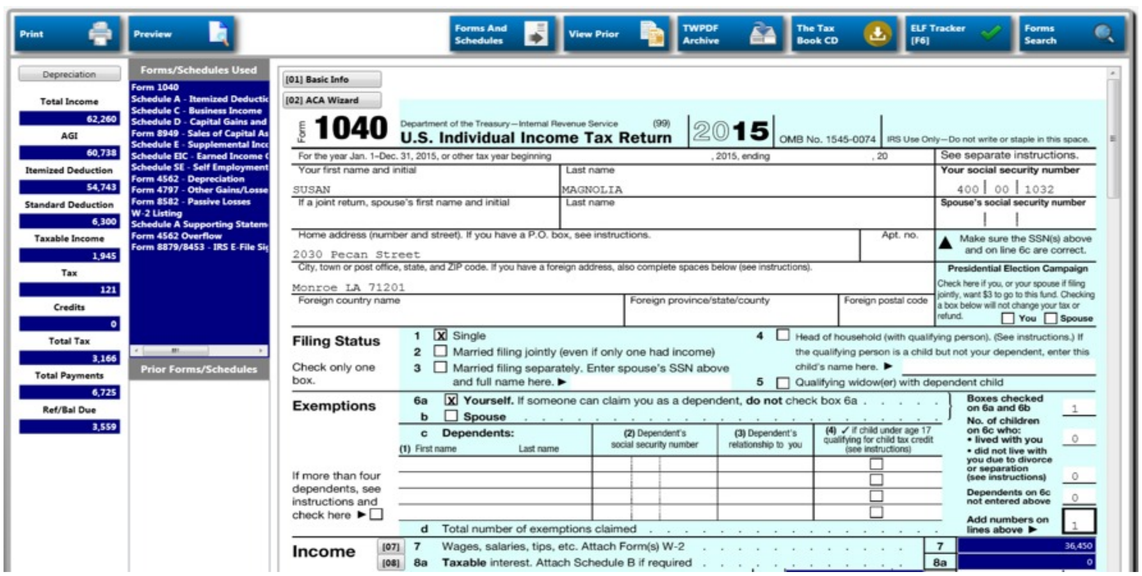
Wintax Continued - 1040 Line Input

This page is the main launch point of the federal tax return and the federal form 1040 is the main design flow for this page. Constant total calculations are shown in the left panel. Forms and schedules used are displayed in the middle panel and those forms or schedules can be accessed by double clicking those forms.

The main forms and schedules item selections are found in conjunction with the line numbers of the 1040. We also added specific page access if that line is clicked with your mouse.

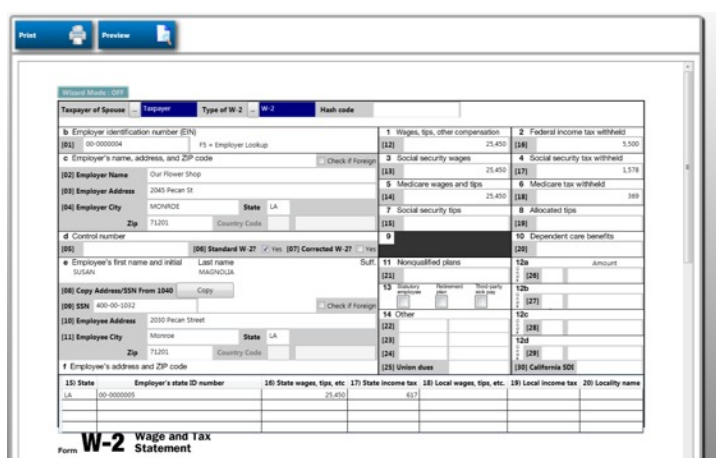
We also included our Forms Search capabilities that had previously only been available in our direct Forms & Schedules page.



W-2 Input

The W-2 Input page has been modernized. We have put special focus on the flow and tab order of the W-2 page.

The W-2 follows the IRS W-2 form. We have added the wizard mode button so that you can turn on or off the wizard flow at any time, whether you are in edit mode or entering a new W-2 transaction.



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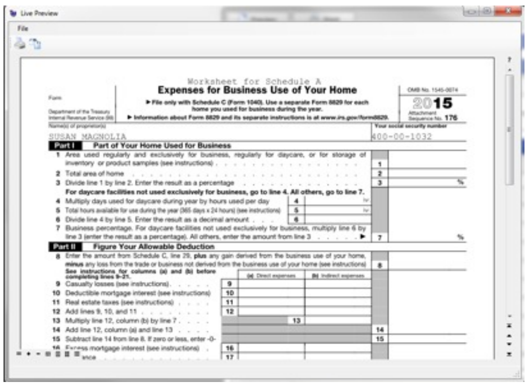
Wintax Continued - Live View



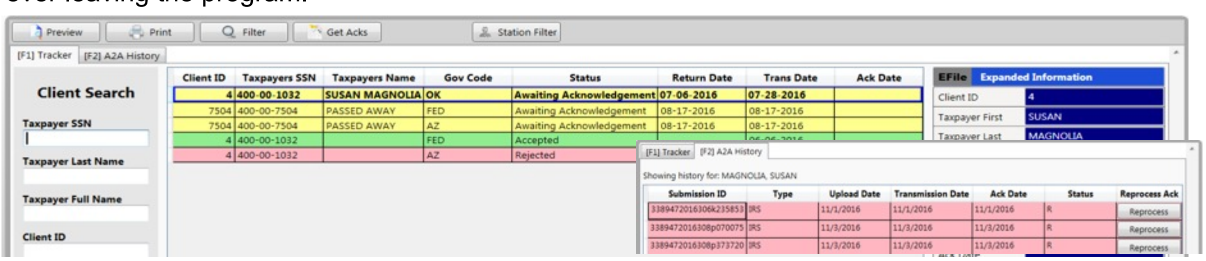
This is the next evolution to our forms preview and constant calculations. Designed primarily for you dual or large monitor clients, hitting your F12 key will open the live view window. This can be dragged to a second monitor or space on a large monitor.

For supported forms this will then display the active form or schedule. As dollar amounts are changed and calculated the PDF will be instantly updated, giving you even more tax return information at your fingertips.

Expanded E-File Tracking

We have enhanced our outstanding e-file tracking system even more. The new system will now handle an unlimited number of state records, integrate seamlessly with the client selection data grid, and includes an A2A server database tab.

The new A2A server tab will show you a two week history of an individual tax return's e-file A2A progress. Also in these individual data records, acknowledgement files can be re-hung for download and processing. This can still be done through our website but can now also be done here without ever leaving the program.



I have just scratched the surface of the new program and its capabilities. Our posted video will give you a better overview of the new program, so we encourage you to check it out.

We are excited about the new Wintax program. It opens the door to so many additional opportunities for future goals and tools.

Although we are very excited about the new program, we are also cautious. We will continue to support and enhance our legacy Wintax program.

The new program is in a pilot or test year and is limited in state support as well as native forms and schedules. The program natively supports CA, IL, and UT and uses the legacy program to support all the other states and federal forms that are not native to the new system. As you go into the forms and schedules page, any buttons that are gray are disabled because they are not natively in the system. However most of the other federal forms and schedules are available by linking the new program to the legacy program in the defaults and settings page.

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 2016. 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.
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.

IRS

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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 12-15-2016. (These programs will be downloaded from our website this year.)

Wintax and other income tax programs starting 12-26-16.

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.

Annual Seminar

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 Tuesday January 3rd from 9 AM - 4 PM and Wednesday, January 4th from 9 AM -12 PM**

Register using the link below:

www.taxwaresystems.com/bulletins/SeminarRegistration2016TY.pdf

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 Wednesday, Nov 30. 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.

Taxware After Tax Season Dinner

TAXWARE

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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 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.