TAXWARE TIMES

SUMMER 2022

SINCE 1979

We Moved!

THE ONLY THING CONSTANT IS CHANGE!

These have been words to live by, but the past few years have really emphasized this point. We are thrilled about the next chapter for Taxware Systems in our new office at **195 N Euclid Ave., Suite 201, Upland CA 91786**.

WHY YOU ARE IMPORTANT

This was another fun tax season! One thing is becoming perfectly clear: working with a good tax professional is, and will continue to be, invaluable! This year you were tasked with (among other things) figuring out Child Tax Credit pre-payments, amounts received for the third EIP deposits, and which clients did and did not spread out their retirement distributions. Your knowledge and experience handling matters like these simply showcase how important you are.

With persistent changes in regulations, the need for competent tax professionals is more important than ever. We have no doubt that taxpayers using DIY products are leaving money on the table and are likely filing incorrectly. Challenges for taxpayers will become even more complicated as they try to navigate things like tracking two different mileage rates this upcoming year. And, of course, we know you read the news: "The IRS is hiring 87,000 new IRS agents." Your professional services will certainly be needed!

TAXWARE ENHANCEMENTS

We have reviewed this past tax year, looked at client feedback, and decided on the best additions and enhancements for our upcoming season. Thank you for your positive feedback and ideas to enhance our programs! We appreciate your input. The following are just a few of the enhancements we have added for this upcoming 2022 filing season programs.

▶ **1099R and 1099I** – Simplified the income and wage reporting page to combine two separate input items into one grid.

▶ **1099K** – With the increased pressure on reporting and disbursing 1099K's we added input for it in the income and wage reporting page. Like the 1099-NEC and 1099-Misc input, entering data here is purely optional. There is no IRS e-file record for these items so if you prefer to key the applicable items directly to the appropriate sections of the program, you can, as this is generally faster.

▶ **1099Misc/1099NEC/1099K Consolidation** – Consolidated these three input grids into one, so they have access and display in one location on the income and wages page of Wintax (similar to the 1099R and 1099I).

▶ **Proforma Organizer Program** – This program has been converted into our NextGen format with full screen optimization, zoom capabilities, native direct print, and all the other benefits of the NextGen platform.

TAXWARE SYSTEMS ANNUAL WEBINAR!

SAVE THE DATES!   December 13th & 14th, 2022 at 9AM PT

It's that time of year again! Mark your calendars for the Taxware Systems' Annual Webinar. We are thrilled to be able to reach and communicate with so many members of our Taxware family of clients at such a critical time of year. This format is a great way to have all your office staff trained as well. One registration per person will be required to view each session on Zoom. Reminders will be sent with the links the day as well as the hour before each specific session.

No Food, No Travel, No Charge! There will be fun prize giveaways for every session. We are thrilled to deliver this event at no cost to our clients. You can register now for free and get additional information on our website.

taxwaresystems.com/seminar

RECAP OF 2022 TRADESHOWS

It was such a pleasure to get out and meet with people at the Latino Tax Fest in Las Vegas in July. Many clients stopped by our booth, and we had 2 lucky clients win gift cards - Arcadio G. & Jerry T.

The IRS Tax Forum was again virtual over 5 weeks and it was great to share our 2 companies' programs in that format.

We have two more live events coming up - NATP in Florida, Sept. 19th & 20th and in Las Vegas, Oct. 19th & 20th. Please be sure to stop by and say hello if you are attending either of these educational events.

Do you have another event you prefer to get your continuing education from? Let us know so we may consider attending to represent in their exhibit hall.

TAXWARE TEAM SPOTLIGHT

With a passion for numbers as well as serving others, Taxware was blessed to have Celmira Galvis join our team in 2016. She quickly immersed herself in the world of income tax and never hesitates to help with even the most difficult situations our clients may encounter.

From Santander, Colombia where she earned her degree in Marketing and Advertising from Politécnico Grancolombiano, Celmira has been key to helping our company meet the needs of many Latino tax professionals.

Celmira has three wonderful children who continually motivate her to do her best. They often tease her about being so busy and productive. "I am grateful that all of my kids and I have a close relationship and we try to spend as much time together as we can," shares Celmira. She and her family frequently enjoy her favorite Colombian and Mediterranean food. Her family can often be found serving people in need throughout the community. Other joys include hiking, dancing and being outside with her family and pets.

We are grateful that Celmira is part of our Taxware Team!

TAXWARE ENHANCEMENTS CONTINUED

▶ **Prior Year Comparison** – Many "behind-the-scenes" improvements to this page to enhance speed.

▶ **1040X** – Added more instructions about what to do next when you select that the amended return is to be electronically filed. We also automated a few of those steps.

▶ **Depreciation Reports Page Count** – Page counts have been added to all the depreciation reports in the lower right-hand corner of each page.

▶ **Master Tax Menu** – The Master Tax Menu will include some identifiers to show which programs have not been downloaded. It will also indicate which programs you have not signed up for.

▶ **Entity State in Use** – Changed to be client specific instead of including a global default. Some clients were not changing the applicable state in use. This will basically function like the 1040 program now in that you will need to select a state.

These, and many other new features will continue to be added to the programs for your benefit.

Most Sincerely,
Taxware Systems Inc.

TAXCOMM
THE COMPLETE CLIENT COMMUNICATION TOOL

◀◀ **SIGN UP FOR YOUR FREE TRIAL TODAY!**

This has been an exciting year for TaxComm. We have added many great features that we use in our office while working with our tax clients. Good client communications tools are necessary, and the more we utilize these tools, the more possibilities become available.

Below are features added this year and you can find more details in our manual at **TaxComm.NET**.

▶ **Booking & Scheduling** – Added an easy-to-read calendar to send to your TaxComm clients so they can schedule a meeting with you. You can block days and times that you are available and not available.

▶ **Tax Return Presentations** – A great feature and function especially for Wintax 1040 clients through the Wintax API. Your TaxComm clients can easily view their tax return in summary seeing what their refund or balance due is. This feature can even be made into an action item, so the client is basically signing off on the tax return.

▶ **Wintax API** – The integration between Wintax and TaxComm continues to grow. One of the main integration items we added this year allows you to view and download documents right from Wintax's Income and Wage reporting page. With this feature you do not have to open TaxComm and view or download supporting documentation. We know speed is important to you and this feature is a huge time saver. Our additional OCR option can even be pulled into Wintax's W2 and 1099 pages.

▶ **Batch Import** – For those of you who are starting out new with TaxComm or have a new large block of tax clients, we added a batch import function. This function uses a provided excel template and will import as much or as little data that is included in your file.

▶ **Client Report** – On your dashboard you can produce a client listing report to match whatever filter you have selected on the page at that time. An example would be if you would like a report of clients that have not completed their TaxComm registration, you can simply click that filter tile and then click Generate Report. This produces a report for printing or viewing of the clients you selected.

▶ **Files Handled/Unhandled** – Sometimes you may not remember whether you have downloaded a document your client uploaded to you. Some of the file names the client used may be confusing. To help with this we divided the uploaded files section to have two columns: Unhandled and Handled. When you have what you need from uploaded document you can simply drag it to the right into the Handled column. You can also input any notes you would like to associate with each file.

▶ **Enhanced Video Conferencing** – In addition to enhancing the overall quality of the video, we added the ability to blur backgrounds, have tiled views, and start a video conference on the fly without creating a client action.

The development team is excited about the vision for adding new features and continually refining the flow of the program. Any questions or concerns please reach out to us via email at **support@taxcomm.net**.

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TAXWARE SYSTEMS

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Each referral will also enter you into a raffle at our annual webinar!

You can send us your referrals through our website at *taxwaresystems.com/refer-a-friend*
or have them call us at *800.877.1065*. Make sure they tell us you sent them!

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TAXWARE
LEGAL **TENDER**

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