

# TAXWARE TIMES

SUMMER 2019  
SINCE 1979



## A LETTER FROM US

Summer is a time of excitement at Taxware when we get to turn our focus to enhancing, improving and implementing the many updates that will enrich the functionality of the programs we offer. Most of these ideas come straight from you, our clients, shared throughout the tax season. We appreciate the opportunity to grow and adapt to client needs and changing technology to make our software better every year.

Our Wintax NextGen software is built utilizing many of the latest and greatest tools in the Microsoft development world. As you have seen, our new platform has been able to help us create faster, scalable, and more secure applications. Ultimately, we felt that this speed and security couldn't be matched in a web-based environment. It has been fun for us to be able to showcase our suite of programs during this tradeshow season and we continue to receive extremely positive feedback.

Here are the highlights of what we have been working on that you can look forward to seeing in the 2019 income tax software. We won't be able to cover them all or in detail in this article, so we encourage you to come to learn from us at our Annual Seminar or sign up for our upcoming Updates and Program Highlights webinar for more information. Additional information in upcoming newsletters, emails and blog posts will also be available.

Many of the updates focus on efficiency and security to improve your workflow and options:

- ▶ Speeding up the process but keeping the integrity of the Form 8867-Due Diligence has been a priority. Switching to radio buttons and checkboxes where possible will quicken the pace. When it comes to dependents, we have also added options to recall the answers used from the prior year as well as copy the responses input from another dependent.
- ▶ The e-filing flow will now incorporate validation into the process. Included in both batch and individual return e-filing, the program will not permit you from sending tax returns that fail validation. Reports have been added to verify which returns were transmitted and which returns were not transmitted due to validation issues for batch filing. For filing single tax returns, the program will automatically load the validation system for you to view the errors that need to be corrected.
- ▶ Most states are now native to our NextGen format in the Wintax 1040 program and we are very close to 100%.
- ▶ An option has been added that would allow you to automatically password protect completed tax return and Form 8879 signature PDF documents.
- ▶ Working hand in hand with the PDF passwords the program can also email the PDF with defaulted body text right from within Wintax.
- ▶ River City Bank has been a stable provider of bank products in this industry for many years. We have added a full integration for their products and bank processing similar to our other banking partners of TPG and Refund Advantage.
- ▶ Bank acknowledgments are processed and displayed right in the electronic filing tracker as well as expanded client information pages.
- ▶ Basic texting from within the program is currently available with enhanced texting options available through our partnership with Textellent - see webinar information to learn more.

The business programs and forms have seen a huge overhaul and you will immediately notice the following upgrades:

- ▶ The Corporation and S Corporation programs have been upgraded to our NextGen format with visual and functional upgrades that will be noticeable in all 4 entity programs.
- ▶ Automatic updates, handled in the background, similar to the 1040 program, will improve the efficiency of ensuring you always have the most current version of the program and notify you if an update was found.
- ▶ The Entity Electronic Filing System has been updated to include a similar tracker and current client selection page to the Wintax 1040 program.

We know that these, and many of the other new features that continue to be added to the programs will be a benefit to you. We look forward to working with you this upcoming tax season. Thank you for helping us celebrate 40 years! We value your business and the trust you place in us.

Most Sincerely,  
**Taxware Systems Inc.**



## TEXTELLENT WEBINAR

Wednesday, October 2<sup>nd</sup> at 10AM PST

See page 3 for more information.

## UPDATES AND PROGRAM HIGHLIGHTS WEBINAR

Tuesday, December 3<sup>rd</sup> at 9AM PST

If you are unable to come to the Annual Seminar, you will not want to miss this webinar. The 2019 Tax year software updates and other highlights will be shared.

## NEW CLIENT TRAINING WEBINAR

Wednesday, December 4<sup>th</sup> at 9AM PST

This webinar is specifically designed for new clients but if you have new employees that need to become familiar with the program, then this is a great place for them to start learning.

## ENTITIES 101 TRAINING WEBINAR

Thursday, December 5<sup>th</sup> at 9AM PST

This webinar will help you get the basic knowledge needed to utilize our Entity programs and also include an overview of the updates made for the 2019 tax year.

Space is limited for each of these webinars, so if you are interested in attending please email your registration to [support@taxwaresystems.com](mailto:support@taxwaresystems.com) right away. In your registration email please include your Client ID, the email address for each computer that will be logging in and add the specific webinar title to the subject line. We will follow up with an email that includes the access code required for entry to the webinar.

# TAXWARE SYSTEMS ANNUAL SEMINAR

New Time! Mark your calendars for our annual seminar scheduled for **Monday, December 16<sup>th</sup>**. It is a busy time of year but we know that you will find value in joining with us to learn about changes in the tax laws, how they have been incorporated into the Wintax NextGen program, and meeting together to kick off the new season. We have consolidated the agenda into one day and will have a continental breakfast and lunch included. We look forward to meeting face to face with our clients and encourage you to attend.

More information will follow as we get closer to the event. Registration will be completed on Eventbrite.

[taxwaresystems.com/seminar](http://taxwaresystems.com/seminar)

The seminar will be held at Azure Hotel and Suites. For hotel reservations be sure to mention you will be attending the Taxware Seminar for a special rate.

Monday, December 16<sup>th</sup> at 9AM - 5PM PST

Azure Hotel and Suites  
Phone: 909.284.8670

1945 E. Holt Blvd.  
Ontario, CA 91761

## PROGRAM RELEASE

We often reminisce to the days in the late 80's when we worked around the clock duplicating 5 ¼" disks and included 6 of them to accommodate the program size to get them ready to ship the day after Christmas each year.

A lot has changed in this industry with both technology as well as the number of changes that flow down from the IRS and state agencies in which we must adapt to quickly. The initial release of our 2019 Tax Year software will be available mid December through the Client Login Portal located on our website and will be announced with an Email, Wintax Alert in messages and a Facebook message at that time. We will not be shipping a hard copy of the software so please ensure that the email address that we have on file for you is accurate.

## STAY CONNECTED

The IRS attempts to alert tax professionals with important information like tax law, forms, and electronic filing service status updates, as well as when they learn of a new scams that can be especially common during the filing season. Sign up so you can stay up to date with the latest alerts and tax administration issues:

- ▶ **e-News for Tax Professionals** – A weekly digest of important tax news geared for tax practitioners.  
**Sign up here:** [irs.gov/e-file-providers/join-e-news-for-tax-professionals](https://irs.gov/e-file-providers/join-e-news-for-tax-professionals)
- ▶ **QuickAlerts** – An urgent messaging system regarding e-File for tax professionals who have e-Services accounts.  
**Sign up here:** [irs.gov/e-file-providers/subscribe-to-quick-alerts](https://irs.gov/e-file-providers/subscribe-to-quick-alerts)
- ▶ **IRS social media** – The IRS uses several social media outlets to connect with tax pros and with taxpayers. Follow the IRS using the links below.
  - ▶ [Twitter.com/IRStaxpros](https://twitter.com/IRStaxpros)
  - ▶ [Twitter.com/IRSnews](https://twitter.com/IRSnews)
  - ▶ [Facebook.com/IRStaxpros](https://facebook.com/IRStaxpros)

## BANK PRODUCT INTERGRATION

The ability to provide a variety of options for payment of your preparation fees, as well as provide other financial products your clients may be interested in, is important to many tax professionals. Many look to bank products to provide that flexibility. Taxware provides integration with Refund Advantage, River City Bank and TPG-Tax Products Group to give our clients a variety of options in both product and services to grow their business.

We are happy to announce that we will have a complete integration with River City Bank included in Wintax NextGen for the 2019 tax year. If you currently use, or are considering River City Bank for your business, you can find more information on their products at [rcbtaxdivision.com](http://rcbtaxdivision.com).

The banks typically announce their programs by November and open their annual enrollment at the same time. Enrollment Applications will again be submitted through your 2018 Wintax NextGen Program and we will send an email to let you know when they are open for submission.

For more information we have listed their contact information below.

**REFUND ADVANTAGE**  
[refund-advantage.com](http://refund-advantage.com)  
800.967.4934

**TPG/SANTA BARBARA**  
[sbtpg.com](http://sbtpg.com)  
800.779.7228

**RIVER CITY BANK**  
[rcbtaxdivision.com](http://rcbtaxdivision.com)  
888.820.7848



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## SYSTEM REQUIREMENTS

In January of 2020 Microsoft will discontinue all support of the operating system Windows 7. This includes all updates, most important of which are security updates and compatibility updates. This means that any security breaches in Windows 7 from then on will go unfixed, leading to your client's data being vulnerable to compromise. It also means that as Taxware continues to evolve with the latest technology, we will no longer attempt to fix issues related to Windows 7. If you have any machines that are still using Windows 7 we highly advise purchasing a replacement machine that uses Windows 10, or at the very least upgrading the machine to Windows 10. We suggest replacement over upgrading as many older machines will not meet necessary specifications to run Windows 10. Before upgrading or replacing a system, remember to backup your data for transfer. Taxware does not have a copy of your data. If you have questions about upgrading or purchasing a replacement, contact an IT professional to discuss what is right for you.

## **WEBINAR**

We are always looking to provide information and technology that could benefit and improve the tax practices of our clients. In that effort, we have selected to partner with Textellent to provide cutting edge texting capabilities that will help our valued clients better communicate with their customers.

We encourage you to sign up for this exclusive webinar for Taxware clients. You will learn about their intuitive appointment scheduler that could save you hours of time and hassle in the effort of scheduling any type of appointment with your clients. You will also learn why texting is the newest, most effective business tool for tax & accounting professionals and how Wintax will integrate with Textellent to make reaching your customers quicker and easier during the busiest time of year.

If you are interested in this webinar, please email us your name, client ID and email to [sales@taxwaresystems.com](mailto:sales@taxwaresystems.com). An email to confirm registration will follow.

CELEBRATING  
**40**  
YEARS

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[taxwaresystems.com/  
40th-anniversary-contest](http://taxwaresystems.com/40th-anniversary-contest)





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## TAXWARE SYSTEMS REFER-A-FRIEND PROGRAM

Did you know if you refer someone to us, and they sign up,  
you get \$100 off your software?

Have your friends call us today at 800-877-1065, so they can also -

**EXPERIENCE THE TAXWARE DIFFERENCE**

 **Will we see you there?**

Stop by our booth and we will enter you into a drawing for a Visa Gift Card. If you bring a friend to introduce to Taxware, you will receive a second entry for the drawing. We will have one drawing at each show.



**IRS NationwideTax Forum**  
Sept. 17th-19th:  
San Diego, CA Booth #568

**Latino Tax Pro**  
Anaheim Conference  
Oct. 19th Anaheim, CA

