TAXWARE TIMES

FALL 2018

SINCE 1979

NEWSLETTER INDEX

HOLIDAY HOURS

Our office will be closed for the days listed below to celebrate the fall and winter holiday season.

THANKSGIVING
November 22nd & 23rd, 2018

CHRISTMAS
December 25th, 2018

NEW YEARS DAY
January 1st, 2018

CELEBRATING 40 YEARS

It was 40 years ago this upcoming tax season that our President and Founder, King Dalton, CPA, began his venture into computerized tax processing. At this time a "minicomputer" was the size of a large desk, cost around $25,000, required constant maintenance and was completely obsolete in less than a few years.

The early years of computers and tax preparation software were a time of discovery and constant change as hardware continued to develop and improve in many ways including both convenience of size as well as processing speed. The development of laser printers combined with a more unified programming language was a large step forward in the tax preparation world and Taxware Systems was there to lead the way.

In an effort to cut down on the amount of paper mailed and housed by the IRS, in 1986 they initiated a very select and limited pilot project with the intent to electronically transmit tax returns via modem. Once again Taxware was on the ground floor led by our Vice President, successfully entering the modern age of E-file.

Income Tax and tax prep software have continued to advance as laws, and technology evolve at a rapid pace. Taxware continues to put the needs of our clients as paramount as we continue to make SPEED, SERVICE, and SECURITY our top priorities. We are here for you, and consistently prove this, as we personally answer our phone and your questions to provide a level of customer service that hearkens back to 40 years ago when it all began.

Watch for more histories and contests to come in your email in 2019.

Thank you for celebrating 40 years with us!

Taxware Systems Inc.

HAPPY Holidays

WORDS FROM OUR FOUNDER

Another tax season is almost here. Looking back, my first tax season after leaving the IRS was for 1963 tax returns. Back then we used pencils to enter the data on translucent forms which were sandwiched with a form and copied. Clunky calculators were used for arithmetic. Division and multiplication was possible but extremely slow. If an error was made it was necessary to use a pencil eraser and change all the numbers. There were some complex calculations such as the maximum tax on earned income and income averaging that were quite difficult and could be real brain twisters.

What a difference now! I have used the Taxware's NextGen program since inception and have fallen in love with it. I frequently use the Tax Planner in the summary menu. It is so easy and gives quick answers, especially for the new law changes that came into place during 2018.

Here are a few tips as you get ready for the new season:

- Get organized. Use the time before the season starts to get familiar with the new law and its implementation.
- If you are new to Taxware, spend some time entering data using the 2017 program. Now is the time to learn what is new and different from what you have previously used.
- Establish a consistent work flow from the first interview to completion and e-filing of the returns.
- Be sure to establish a good backup plan for your data. We suggest once a return is prepared that the Archive to PDF feature be used as well as digitally backing up the data.
- As you review returns, pay particular attention to calculations that do not seem right or reasonable based on the result.
- Establish routines for handling the client information. Do you make copies and file the paper? An alternative is to use our DocArk program to scan and digitize the raw data. If you use DocArk, be sure to back up those files as well.
- If you have others enter the data into the system our input forms and/or proformas work well. I prefer to enter the information myself.
- Be sure to use the due diligence procedure to protect yourself from penalties. Even though there is no longer a dependency exemption, the criteria for a dependent is still necessary for the child and earned income credits.
- Develop a screen set up that suits you. Many are using dual monitors. I use one large screen and can have the previous year's menus up along with the current year.
- Of course, you need to renew your PTIN, have an EFIN, and make the proper arrangements with the banks if you use their products.

There certainly are many more things to consider, but hopefully these tips will help a little.

Have a great tax season,

King Dalton, CPA
FOUNDER OF TAXWARE SYSTEMS

2018 SOFTWARE PREVIEW WEBINAR

The preview of the 2018 Wintax NextGen Individual program will be hosted through GoToMeeting. Space is limited, so if you are interested in attending please email your registration right away. We will be recording this session for clients who cannot attend.

In your registration email please include your client ID, the email address for each computer that will be logging in, and add "2018 Software Preview" in the subject line. Send it to sales@taxwaresystems.com and we will follow up with an email that includes the access code required for entry to the webinar.

December 6th, 2018 at 10:00AM PST

NEW CLIENT DETAILED TRAINING CLASS

The detailed training class will cover the basics and enhancements to our Wintax NextGen program. This webinar will be hosted through GoToMeeting. Space is limited, so if you are interested in attending please email your registration right away. We will be recording this session for clients who cannot attend.

In your registration email please include your client ID, the email address for each computer that will be logging in, and add "New Client Detailed Training Class" in the subject line. Send it to sales@taxwaresystems.com and we will follow up with an email that includes the access code required for entry to the webinar.

December 5th, 2018 at 10:00AM PST

TECH TIPS

As the 2018 tax year approaches, we at Taxware Systems would like to remind tax preparers that protecting taxpayer information is extremely important.

This includes protection from environmental risks (e.g. fire, water, tornado, earthquake), business resources (e.g. equipment failure, supply chain disruption, employees) and hostile actors (e.g. hackers, criminals, nation-state actors). The latter has been on the rise in recent years and tax professionals should be prepared for each of these risks. Read more on our blog about how we recommend protecting your client data.

taxwaresystems.com/protecting-your-client-data

BANK ENROLLMENT

We are pleased to announce that your annual Bank Enrollment Applications are now open to be submitted through your 2017 Wintax NextGen Program. You must have the latest version of Wintax which has just been posted with a minimum of version of 6.1

Both banks confirmed their programs and offerings for the upcoming tax season. For more information we have listed their contact information below.

REFUND ADVANTAGE	TPG/SANTA BARBARA
refund-advantage.com	sbtpg.com
800.967.4934	800.779.7228

Instructions on how to begin your enrollment application for Refund Advantage and TPG-Santa Barbara Bank, can be found on our website using the link below. Clients that work with **River City Bank** (800.564.7144) should go to their website (rivercitybank.com) and enroll directly. If you have questions or need help with the bank application, give us a call at (800)877-1065.

taxwaresystems.com/bank-enrollment-instructions

ANNUAL SEMINAR

Mark your calendars for our annual seminar scheduled for Monday, January 7th, 2019. It is a busy time of year but we know that you will find value in joining with us to learn about the final 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 breakfast and lunch included. We look forward to meeting face to face with our clients and encourage you to attend. Follow the link below to reserve your seat for our annual seminar.

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.

January 7th, 2019 AT 9AM - 5PM PST

AZURE HOTEL AND SUITES
909.390.7778

1945 E. Holt Blvd.
Ontario, CA 91761

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IRS SERVER SHUTDOWN

The IRS will do their annual shutdown of the e-file systems November 17th, 2018 11:59PM ET with the last transmission being accepted at 10PM ET. Keep in mind that any acknowledgements that don't come back before the shutdown will be held until the IRS re-opens for the 2018 tax season in January of 2019. Please note that many states do not post acknowledgments for a day or two and may not come back before the shutdown. Taxware's e-file service will follow the same timeline so if you try to transmit tax returns electronically after that date the program will NOT post them. We encourage you to reach out to your clients that you are working with late filings, and file at least a couple days before the November 17th, 2018 shutdown.

HUB TESTING

Taxware will allow electronic filing during HUB testing for clients who register.

The IRS will process a controlled amount of tax returns submitted through Wintax before E-file opens through a program they call “HUB Testing”.

This controlled environment will provide our interested clients with the opportunity to send returns before Efile opens with the understanding that the IRS uses this time to test the tax return submission process and allow for fixing bugs before opening the doors to all taxpayers.

Refund processing of tax returns sent during HUB testing will occur during the normal open electronic filing season. Refunds will not be issued during HUB testing. If you choose to participate your clients will not receive their refund any faster or slower.

If you are interested in registering to participate in HUB testing please email us at **support@taxwaresystems.com** to have your company name added to the list of interested participants.

PROFORMA ORGANIZER

The Proforma Organizer has been updated for the 2018 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.

https://download.taxwaresystems.com/installs/18proforma.exe

SYSTEM REQUIREMENTS

Nearly all mid-range computers and most low-end computers on the market today should be sufficient to run the Wintax NextGen program smoothly. The minimum and recommended requirements are listed to the right. It is highly recommended that your operating system be upgraded to Windows 10 if possible, as official Microsoft support for Windows 7 ends on January 14th, 2020. This is the same date that Taxware officially no longer supports Windows 7.

Wintax NextGen cannot be installed on computers running Windows XP or Vista. Microsoft stopped supporting Windows XP and Vista several years ago, which means we are no longer able to support them. The programming language used for developing our software is not compatible with these versions of Windows.

It is also recommended that you do not enable the windows font magnification feature. While it might work in other programs on your computer, it will change the fonts in some of our software which can make certain lines unreadable. It is recommended to use the windows magnifying glass accessibility feature which you can enable by pressing the 'Windows Key' + '=' button combination. This feature does not directly interfere with the program and can be used in nearly any windows application. The NextGen program also has a built in zoom feature which can be utilized by holding the 'CTRL' key plus moving your mouse wheel.

MINIMUM REQUIREMENTS

OPERATING SYSTEM:	Windows 7+ (64 Bit)
MEMORY:	4 GB RAM
DISK SPACE:	1.5GB per tax year (If you have many clients or you are a paperless office it is recommended to have more space allocated as PDF files take up a lot of space)
SCREEN RESOLUTION:	1280 x 720
BACKUPS:	External drive recommended for backing up data
SOFTWARE:	Latest version of Microsoft .NET Framework

RECOMMENDED REQUIREMENTS

OPERATING SYSTEM:	Windows 10
MEMORY:	6+ GB RAM
DISK SPACE:	1.5GB per tax year (If you have many clients or you are a paperless office it is recommended to have more space allocated as PDF files take up a lot of space)
SCREEN RESOLUTION:	1920 x 1080
BACKUPS:	External drive recommended for backing up data
SOFTWARE:	Adobe Acrobat Reader

We are thankful for you!

REFER-A-FRIEND LIMITED TIME OFFER

We are thankful for you! If you refer someone to us, and they sign up by Thanksgiving, we will give you $150 (regularly $100) **off of your software.**

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

EXPERIENCE THE TAXWARE DIFFERENCE

Textellent INTEGRATION

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 watch the recorded webinar to learn more about Textellent and how we have integrated it into our software.

textellent.com/webinar/recording_24oct18.html

THE TAX BOOK

Real Answers. Real Fast!

As a client of Taxware Systems you are entitled to receive 10-25% off all TheTaxBook products and free shipping year-round! When ordering, be sure to use Taxware's Promo Code to ensure you receive the negotiated discount.

Order at: thetaxbook.com/TaxwareSystems
Taxware Promo Code: 785

Learn more using the link below about the *5 Free Services* included with every order.

taxwaresystems.com/thetaxbook/

PROGRAM FEATURE SPOTLIGHT

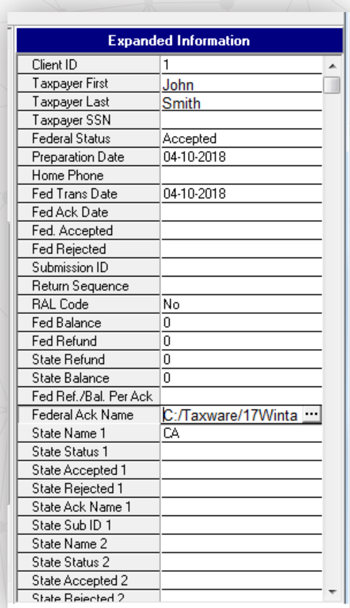
The new features added to the E-File Tracker in the NextGen program make tracking your acknowledgments (acks) much easier. In the Legacy program, reprinting acks was hard to find in the expanded information and required you to click into a field in order to reprint.

In NextGen, you simply select the acknowledgment for your client and click the "Reprint Ack" button on the right. In a similar vein, Legacy could only show the most recent acknowledgment for a client, but in NextGen the new "Show History" button will show you all the e-file transmissions you have made for that client during the year. It will also allow you to reprocess old acks should the need arise.

You can also share the E-File Tracker across a network so that every workstation you have has access to reprinting acknowledgments. To do this, set the networked ELF Tracker path in the Defaults and Settings menu to the shared program path on your network. Note that this is the program path, not the data path. Once you do this, go into your E-File Status page, click on Rebuild at the top of the screen and double click 'Rebuild ELF Tracker'. Your acknowledgments should appear. Go to your Recall Client screen and reconstruct, and the status of your clients will now color code your client listing.

IMPORTANT: The data paths on each computer in your network must be identical for this feature. If you would like some assistance setting up this feature contact us and one of our technicians will assist you.

LEGACY WINTAX



WINTAX NEXTGEN